

SOCIAL EXCLUSION: THEORY AND PRACTICE

COURSE CODE: M23PS02DE

Postgraduate Programme in Political Science
Discipline Specific Elective Course
Self Learning Material



SREENARAYANAGURU
OPEN UNIVERSITY

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The State University for Education, Training and Research in Blended Format, Kerala

SREENARAYANAGURU OPEN UNIVERSITY

Vision

To increase access of potential learners of all categories to higher education, research and training, and ensure equity through delivery of high quality processes and outcomes fostering inclusive educational empowerment for social advancement.

Mission

To be benchmarked as a model for conservation and dissemination of knowledge and skill on blended and virtual mode in education, training and research for normal, continuing, and adult learners.

Pathway

Access and Quality define Equity.

Social Exclusion: Theory and Practice

Course Code: M23PS02DE

Semester - III

Discipline Specific Elective Course
Postgraduate Programme in Political Science
Self Learning Material
(With Model Question Paper Sets)



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Semester- III

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Postgraduate Programme in Political Science

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MESSAGE FROM VICE CHANCELLOR

Dear learner,

I extend my heartfelt greetings and profound enthusiasm as I warmly welcome you to Sreenarayanaguru Open University. Established in September 2020 as a state-led endeavour to promote higher education through open and distance learning modes, our institution was shaped by the guiding principle that access and quality are the cornerstones of equity. We have firmly resolved to uphold the highest standards of education, setting the benchmark and charting the course.

The courses offered by the Sreenarayanaguru Open University aim to strike a quality balance, ensuring students are equipped for both personal growth and professional excellence. The University embraces the widely acclaimed "blended format," a practical framework that harmoniously integrates Self-Learning Materials, Classroom Counseling, and Virtual modes, fostering a dynamic and enriching experience for both learners and instructors.

The University aims to offer you an engaging and thought-provoking educational journey. The MA programme in Political Science offers an advanced study of governmental structures and processes. It combines theoretical frameworks with practical applications, emphasising policy analysis and implementation. The curriculum covers organizational theory, public policy, administrative law, governance ethics, etc. Through the courses, learners gain expertise in public sector management. This programme prepares graduates for leadership roles in government agencies, non-profits, and international organizations, as well as for further academic pursuits. The Self-Learning Material has been meticulously crafted, incorporating relevant examples to facilitate better comprehension.

Rest assured, the university's student support services will be at your disposal throughout your academic journey, readily available to address any concerns or grievances you may encounter. We encourage you to reach out to us freely regarding any matter about your academic programme. It is our sincere wish that you achieve the utmost success.



Regards,
Dr. Jagathy Raj V.P.

01-10-2025

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BLOCK 1

Social Exclusion: Conceptualization



UNIT 1

Social Exclusion: Theories, Debates and Issues

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ define the concept of social exclusion and explain its significance in understanding societal inequalities
- ▶ identify main features, dimensions, and mechanisms of social exclusion in different societies
- ▶ examine main theories of social exclusion, including approaches from Karl Marx to John Rawls
- ▶ reflect on the ethical dimensions and challenges of addressing social exclusion in a diverse society

Background

We just have to look into a classroom full of excited students eagerly discussing their weekend plans. Now, picture one child sitting in the corner, isolated—not by choice, but because their peers refuse to include them. This child’s exclusion is not just a one-time occurrence; it represents a larger pattern that many people experience in society. Whether it’s because of caste, religion, gender, disability, or socio-economic status, social exclusion is a lived reality for millions around the world.

Social exclusion is more than being left out of a group activity; it is the systemic denial of opportunities, rights, and resources that others take for granted. It often operates invisibly, embedded in the structures and norms of society, leaving those excluded feeling invisible and powerless. For instance, in rural India, Dalit communities often face barriers to education, land ownership, and even accessing public water sources. These barriers are not accidental; they are deeply rooted in historical hierarchies and prejudices.

Consider a young woman from a marginalized community who dreams of becoming a doctor. She excels in her studies, but systemic barriers such as lack of financial support and societal stereotypes block her path. Her struggle is not just personal; it reflects the broader societal mechanisms that keep certain groups on the margins.

Social exclusion isn't confined to rural areas or developing nations. In urban spaces, the story of migrant workers reveals another layer. Despite being the backbone of city infrastructure, they often live in slums with inadequate access to health care, education, and sanitation. During crises like the COVID-19 pandemic, these workers were among the hardest hit, forced to walk miles back to their villages with no safety net to support them.

Another example is the exclusion faced by people with disabilities. Even in modern cities, accessibility remains a challenge—be it public transport, workplaces, or educational institutions. The lack of ramps, sign language interpreters, or inclusive policies sends a silent but clear message: *"You don't belong here."*

Social exclusion doesn't just harm individuals; it tears at the fabric of society. When large sections of people are denied participation, the potential for innovation, growth, and harmony diminishes. Yet, stories of resilience also emerge. Movements for inclusion, whether by social activists, women's rights groups, or indigenous communities, remind us that change is possible when exclusion is challenged.

This chapter will delve into the concept of social exclusion, exploring its causes, consequences, and potential solutions. Let's begin this journey by understanding the invisible walls that divide us—and how we can tear them down.

Keywords

Social exclusion, inequality, marginalization, caste, race, gender, class, inclusion, discrimination, social justice.

Discussion

Social exclusion happens when certain people are left out of important parts of life, like getting a good job, having access to education, or even making friends. It can happen for many reasons, such as being poor, facing discrimination, or living in tough situations. For example, someone who can't go to



school might find it harder to get a good job later, which could keep them stuck in a cycle of hardship. People who are sick, discriminated against, or have been involved in crime can also face exclusion, and these challenges can push them further to the edges of society. Much like how Thomas Gray wrote in his *Elegy Written in a Country Churchyard*, "Full many a flower is born to blush unseen, And waste its sweetness on the desert air;" people who are excluded can have so much potential, but their talents and contributions are often overlooked and wasted.

But social exclusion doesn't just affect the individual—it affects the entire community. When some people are left out, it creates feelings of unfairness and division. This lack of connection can make people feel disconnected and unsupported, leading to tension and a sense that we're not all in this together. It weakens the bonds that hold a society together. If some people are excluded from basic things like jobs, healthcare, or education, the gap between different groups gets wider, and society becomes less united. Just like a flower's beauty fades away in a desert, the skills and abilities of those excluded are not given the chance to blossom and enrich the whole community. When we recognize and address social exclusion, we can start building a more inclusive world where everyone has a chance to contribute, and society is stronger, kinder, and more connected.

1.1.1 Social Exclusion

Social exclusion is what happens when some people or groups are left out of the important parts of life, like getting a good education, finding jobs, or joining in on community activities. It's not just about being poor—sometimes, people are excluded because of their race, gender, health, or where they live. For example, missing out on education can lead to difficulties in securing stable employment, which often results in a lifetime of struggles. This pattern can continue across generations, creating deep-rooted and persistent challenges.

The term "**social exclusion**" first became popular in France during the early 1970s. René Lenoir, French Secretary of State for Social Action, introduced the idea in his 1974 publication *Les Exclus : un Français sur dix*, to describe groups like single parents, persons with disabilities, substance abusers, and others who were not protected by the welfare state and were "ignored" or left out by society (Lenoir, 1974; Silver, 1994). He estimated that these "excluded" made up about **one in ten** of the French

❑ Exclusion creates persistent, generational challenges.

❑ Social exclusion began in France.

population. Since then, the concept has expanded to show how societal rules and institutions determine who belongs and who does not.

Exclusion affects every part of a person's life. Imagine someone who's out of work—they're not just losing money, they're also missing out on the chance to be part of a team or community. If their housing is poor, it might be harder for their kids to study or for them to access healthcare. Sometimes, being judged for things like having a criminal record can make it nearly impossible to start over. These problems stack up, making life especially tough for some people.

❑ Exclusion impacts all aspects of life.

❑ Exclusion harms society as a whole.

This isn't just a personal problem; it's a community problem. When some people are left out, the whole society suffers (Sen, 1999; Stiglitz, 2013). Sociologist Emile Durkheim believed that when people feel disconnected from society, it can lead to bigger issues like crime or loneliness (Haralambos & Holborn, 2013; DeWall, 2013). A strong society is one where everyone feels they belong, and when that happens, communities become more peaceful and productive (Putnam, 2000; Granovetter, 1973).

The good news is that we can solve this. By recognizing social exclusion, governments and communities can create programs to help everyone feel included. For example, offering free education, job training, or better healthcare can make a big difference. When everyone has a fair chance to join in and succeed, society becomes stronger and more united. Together, we can build a world where nobody feels left out.

1.1.1.1 Types of Social Exclusion

Social exclusion is a complex phenomenon that manifests in multiple dimensions, affecting individuals' participation in society. Main types of social exclusion include:

a. Economic Exclusion

Economic exclusion occurs when people or groups are denied access to essential economic opportunities, such as jobs, fair wages, or financial services. This can result from limited job opportunities, low wages, and barriers that prevent full participation in the economy. It leads to issues like poverty, social isolation, and financial struggles. Main causes include

❑ Economic exclusion deepens inequality



discrimination, lack of education, and unfair systems that do not distribute resources equally. Economic exclusion prevents individuals from achieving financial stability, worsening social and economic inequality.

b. Educational Exclusion

Educational exclusion is a serious issue where students are denied access to learning opportunities due to various barriers, such as disabilities, restrictive conditions, or being asked to receive education through home visits instead of attending school. Factors like mental health issues, special educational needs, social deprivation, and personal problems, along with systemic barriers like lack of resources and teacher training, contribute to this exclusion. Efforts like India's Sarva Shiksha Abhiyan (SSA) aim to provide universal education, but challenges in enrolling and retaining all students persist. Educational exclusion limits individual opportunities and hinders societal development by preventing full participation in education and social systems.

❑ Educational exclusion hinders growth.

c. Labour Exclusion

Labour market exclusion refers to barriers that prevent people from fully participating in the workforce, leaving them unemployed, underemployed, or in unstable jobs. This affects individuals with low education, limited work experience, or those in vulnerable groups like young adults not in school or work, early retirees, or domestic workers without legal protection. Main obstacles include inadequate government policies, limited support programs, and socio-economic challenges. To tackle this, targeted interventions are needed to address the specific needs of excluded individuals and create more inclusive labour markets that provide fair work opportunities for all.

❑ Labour exclusion limits fair work.

d. Social Exclusion

Social exclusion is a process where individuals or groups are blocked from fully participating in important areas of society, such as the economy, culture, politics, and social life. This exclusion can be caused by factors like race, gender, ethnicity, religion, disability, sexual orientation, or economic status. It can limit access to jobs, isolate people from social networks, and prevent participation in cultural activities. The consequences include lasting poverty, social isolation, fewer opportunities,

❑ Social exclusion creates inequality and disrupts harmony.

and the transmission of disadvantage across generations. Social exclusion is a widespread issue that creates inequality and disrupts social harmony.

e. Cultural Exclusion

❑ Cultural exclusion limits participation and connection.

Cultural exclusion occurs when people or groups are left out from cultural activities, experiences, and representation due to differences in culture. This can include a lack of access to cultural or recreational activities, inadequate representation in media, or the disregard of their cultural practices. Immigrants, ethnic minorities, indigenous groups, and communities living outside their homeland are most affected. The consequences include a sense of disconnection from one's culture, social isolation, and fewer opportunities to engage with wider society. Theories like Pierre Bourdieu's cultural capital theory and ideas about social rights help explain how cultural exclusion prevents people from fully participating in society based on their cultural identity (Böhnke & Silver, 2023; Haralambos & Holborn, 2013).

Exclusion can happen in various ways, where people are unfairly treated or unable to fully participate in society. Gender exclusion occurs when people are denied opportunities because of their gender, while religious exclusion involves denying rights based on religion. Age-based exclusion mainly affects older people, especially when they retire or are left out of activities. Disability-based exclusion happens when individuals with physical or mental challenges face limited access to education or jobs. Social exclusion is a major issue, as these forms of exclusion often overlap, making life even harder for those affected and preventing them from participating fully in society.

The Digital Gender Divide

Despite 90% of jobs worldwide demanding basic digital skills, the digital gender gap remains stark globally, 1 in 4 women lacks access to a mobile phone, and in South Asia, women are 28% less likely than men to own one, limiting their participation in the digital economy. This highlights how unequal access to technology perpetuates economic disparity.



1.1.1.2 Main Causes of Social Exclusion

Social exclusion happens when people are left out of important parts of society, like having a job, going to school, or taking part in community activities. There are many reasons why this happens, and they can be grouped into four main causes: economic, social, health-related, and structural.

a. Economic Causes

Low income, unemployment, and poor housing are interconnected factors that contribute to social exclusion. When people lack enough money, they are unable to afford basic needs or participate in activities that others enjoy, often missing out on opportunities for better education and healthcare (Sen, 1999; Stiglitz, 2013). Unemployment exacerbates this issue by isolating individuals from social connections and activities, leaving them feeling disconnected from society (Haralambos & Holborn, 2013; DeWalt, 2013). Additionally, poor or unstable housing makes it difficult to access work, school, and other essential services, further hindering one's ability to improve their circumstances and leading to a cycle of disadvantage (Haralambos & Holborn, 2013; Stiglitz, 2013).

❑ Poverty, unemployment, and housing fuel exclusion.

b. Social Causes

Discrimination and political exclusion are social causes that can make people feel left out. Discrimination happens when people are treated unfairly because of things like their race, gender, or appearance, which means they might not get the same chances to join groups or be part of a community. Political exclusion is when people can't take part in decisions that affect their lives, like voting or being involved in politics. This makes them feel like they have no say in important matters and that they don't belong.

❑ Discrimination and political exclusion hinder belonging.

c. Health-Related Causes

Poor health and mental health issues can make people feel left out and isolated. If someone is sick or has a disability, they might find it harder to go to work, school, or join social events, which can make them feel lonely. Mental health problems, like anxiety or depression, can also cause someone to feel too nervous or sad to be with others or ask for help, making it even harder for them to connect with people and feel included.

❑ Poor health and mental issues lead to isolation.

d. Structural Causes

- ❑ Structural barriers limit access to support.

Structural causes of exclusion include issues like limited access to services and institutional barriers. Some people can't get the help they need, like going to school or seeing a doctor, because important services are hard to reach—maybe there aren't enough buses to get to school or health services are too far away. Institutional barriers happen when rules or systems make it harder for people to get help, such as when applying for a job, loan, or housing is difficult. This means that those who need support the most might not be able to access it.

When Loneliness Gets Old!

Did you know that 1 in 3 older people around the world feels lonely or left out? This often happens because they stop working, lose loved ones, or face health problems. In Japan, there's even a word for when elderly people pass away alone without anyone noticing it's called "kodokushi," which means "lonely death."

e. Interconnected Factors

- ❑ Exclusion is a result of interconnected causes.

The causes of social exclusion are often connected. For example, if someone is poor, they might also have bad health, which makes it harder for them to find a job. In addition, society's ideas about who is important and who is not can make exclusion even worse. These causes are all linked together, which is why solving social exclusion takes understanding many different factors.

When we intend to help people who are excluded, we need to understand all the different reasons why it happens. By addressing these causes, we can create a society where everyone has the opportunity to participate and feel included.

1.1.2 Paradigms of Social Exclusion

Exclusion happens in different ways. We have to look at this social exclusion through three Paradigms. The Solidarity Paradigm sees it as a break in social connections, something the state should fix to bring people together. The Specialization Paradigm focuses on how economic barriers stop people from



fully participating in society. The Monopoly Paradigm looks at how powerful groups keep control of resources and opportunities, leaving others out. These ideas help us understand why exclusion happens and why it's important to tackle it.

1. Solidarity Paradigm

- ❑ Exclusion through cultural differences

The solidarity paradigm explains social exclusion as a breakdown in the bonds that connect people to society, emphasizing cultural and moral differences rather than just economic factors (Silver, 1994; Haralambos & Holborn, 2013). It shows that individuals who don't conform to societal norms, such as those from different ethnic backgrounds or with unique beliefs, are often labeled as "outsiders" and excluded (Silver, 1994). This form of exclusion is not only about material inequality but also about how people are judged based on their identity, values, and actions. To address this, the solidarity paradigm calls for rebuilding relationships, fostering mutual understanding, and promoting fairness. By ensuring equal access to opportunities and resources, society can become more inclusive, united, and cohesive, allowing everyone to feel valued and connected.

2. Specialization Paradigm

- ❑ Exclusion through specialized barriers

The Specialization Paradigm explains social exclusion as when people are prevented from moving between different groups or opportunities in society because of their natural differences, such as skills, interests, or abilities (Silver, 1994). For example, someone may excel in math, while another person is talented in art, leading them to specialize in different areas of work or social circles. The idea behind this paradigm is that society should allow people to exchange resources and opportunities for mutual benefit. However, exclusion occurs when individuals are blocked from these exchanges due to discrimination or unfair barriers (Silver, 1994; Haralambos & Holborn, 2013). One clear example of this is in the job market, where many positions require specialized skills or education, making it difficult for individuals who lack those qualifications to access certain careers or switch fields. Social networks also contribute to exclusion, as people often form groups based on shared interests or professions, which can make it harder for them to connect with those outside their circle. These networks, along with institutional barriers like complex job qualifications or licensing systems, can prevent people from moving between fields and further limit opportunities. The Specialization Paradigm

shows how individual differences, combined with market-driven structures, can both foster innovation and create divisions, limiting equal access to opportunities in society (Silver, 1994).

One-Third of the World Left Out

Did you know that about one-third of the world's population—around 2.33 to 2.43 billion people—face being left out of important opportunities like education, jobs, or healthcare? This happens because of unfair systems and power imbalances, which create barriers for many. To solve this, we need to do more than just count the people left out; we must figure out why and how it happens. By focusing on fairness and equality, we can create a world where everyone gets a fair chance to succeed!

3. Monopoly Paradigm

The Monopoly Paradigm of social exclusion explains how some groups use their power to control important resources like jobs and education, making it hard for others to access them (Silver, 1994; Haralambos & Holborn, 2013). Thinkers such as Max Weber and Karl Marx argued that society is structured in ways that benefit dominant groups while disadvantaging others (Parkin, 1983; Taket, 2009). These groups build systems that keep people out, creating barriers to opportunities. This process, known as *social closure*, occurs when groups block outsiders from gaining valued resources, thereby reinforcing inequality (Böhnke & Silver, 2023). As a result, the powerful maintain their advantages, while excluded groups continue to lack equal chances. The paradigm suggests that everyone should have the same rights and opportunities to participate in society, contributing to a fairer world (Sen, 1999; Fraser & Honneth, 2003).

❑ Exclusion through power control

Contemporary examples illustrate these dynamics. For instance, digital platforms such as social media concentrate control of information, shaping who has access and voice (Hall, Morley, & Chen, 1996; Putnam, 2000). Similarly, in the job market, structural biases often leave certain groups marginalized, reflecting broader patterns of inequality (Stiglitz, 2013; Crenshaw, 2017). The Monopoly Paradigm thus highlights how social exclusion is fundamentally about power and calls



for transforming these systems to promote justice and inclusion (Soja, 2010; Harvey, 2009; Rawls, 2019).

1.1.3 Theoretical Foundations of Social Exclusion

□ Theories on Social exclusion

In this section, we will explore various theories that help us understand social exclusion. Social exclusion refers to when people or groups are left out of important parts of society, like access to resources, opportunities, or social connections. Different thinkers have looked at the causes of social exclusion from various angles. Some focus on the structure of society and how things like class and power shape who gets excluded (like Karl Marx and Antonio Gramsci). Others look at the role of space, culture, and networks in shaping social life, such as Edward Soja and Stuart Hall. Some theories focus on economic inequality (Amartya Sen and Joseph Stiglitz), while others address the importance of identity and fairness (Kimberlé Crenshaw and John Rawls). By examining these theories, we can better understand the complex factors that lead to social exclusion and think about ways to create a more inclusive society.

□ Various barriers

1.1.3.1 Structural Theory of Social Exclusion

Social exclusion is when certain people or groups are left out of society in many ways, making it hard for them to fully participate. This happens because of barriers like lack of money, limited social connections, unfair treatment, or not being allowed to take part in politics. It is caused by big societal changes, government rules, and policies that often favour some while ignoring others. Power, prejudice, and labeling also play a role in keeping some groups on the outside. Social exclusion isn't just about being poor—it also means feeling disconnected from society and missing out on basic rights and opportunities. It often affects people based on things like race, class, gender, or disability, showing how society's systems can create unfair barriers.

1.1.3.1.1 Karl Marx

Karl Marx saw social exclusion as something that happens because of the way society is organized, especially under capitalism. He argued that the capitalist system, which focuses on private ownership and profit, creates a divide between two main groups: the bourgeoisie (the property-owning class) and

the proletariat (the working class) (Parkin, 1983; Taket, 2009). This divide leads to social exclusion because workers are treated unfairly and left out of many important aspects of society.

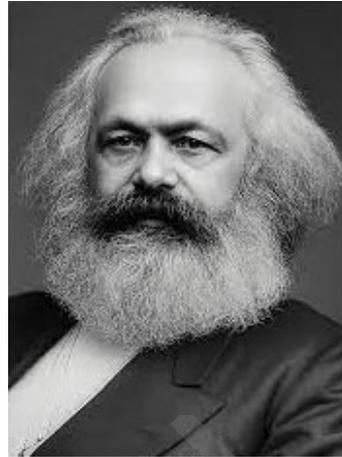


Fig.1.1.1 Karl Marx

❑ Exclusion through class dynamics

In Marx's view, class dynamics are at the heart of social exclusion. The rich owners control most of the resources and the production process, while the workers are forced to work for low wages. This results in alienation, where workers do not feel connected to their labour and lack control over the products they create (Haralambos & Holborn, 2013). In this system, workers are also excluded from owning productive assets like land or factories, making it difficult for them to change their situation (Taket, 2009).

Engels and the Concept of Social Murder

Did you know that Friedrich Engels coined the term "social murder" to describe how capitalism indirectly kills people by creating conditions like poor housing, unsafe workplaces, and lack of healthcare? He argued that the ruling class was fully aware of this but chose profit over human lives, making "social murder" a systemic crime rather than a personal one!

❑ Structural exploitation

Marx also talked about structural exploitation, where the few rich people in charge make money by forcing workers to produce more than what they are paid for. The owners control how the workers live and make sure the workers work hard for very little in return (Parkin, 1983; Stiglitz, 2013). This system keeps the workers in a place where they can't improve their lives, and the rich stay in control.



❑ Class
consciousness
and revolution

Marx believed this kind of social exclusion and unfairness would lead workers to become aware of their situation, a process called class consciousness. He thought that once workers realized how they were being exploited, they would unite and work towards a revolution to change the system. The goal would be to create a society without such deep divides, where everyone has equal access to resources and opportunities (Fraser & Honneth, 2003).

Marx believed that social exclusion happens because of the unfair system of capitalism. The rich control most of the resources, while workers are treated unfairly and disconnected from their work. This leads to exploitation, where workers are forced to produce more than they're paid for. Marx thought that once workers realized how they were being treated, they would unite and work together to change the system. His goal was a society where everyone had equal opportunities and access to resources, ending the divide between the rich and the poor.

1.1.3.1.2 Antonio Gramsci



Fig.1.1.2 Antonio Gramsci

Antonio Gramsci, an Italian thinker, introduced the idea of cultural hegemony to explain how powerful groups stay in control. He argued that the ruling class does not rely only on force but also shapes culture and ideas to make its dominance appear natural and acceptable (Haralambos & Holborn, 2013). In this way, even marginalized or excluded people may accept the system as legitimate. Gramsci emphasized that subaltern groups—those on the margins of society—are prevented from improving their lives without strong political organization and awareness (Hall, Morley, & Chen, 1996). He explained that social exclusion occurs in several ways. First, poor economic and

❑ Political consciousness for change

social conditions often stop marginalized groups from shaping their future. Second, these groups tend to react to the initiatives of the powerful rather than acting independently. Finally, without political awareness, they struggle to see themselves as agents of historical change (Haralambos & Holborn, 2013). For Gramsci, developing political consciousness was essential for breaking free from exclusion (Fraser & Honneth, 2003).

Gramsci's says that

“Normal is not actually normal”

Antonio Gramsci, while imprisoned by Mussolini, developed the idea of cultural hegemony. He argued that the ruling class does not maintain power only through force but also by shaping what people accept as “common sense” or “normal.” In his *Prison Notebooks*, Gramsci explained how culture, ideas, and everyday beliefs can quietly influence people’s thoughts and actions. Think about morning drinks in Kerala: if everyone insists that only tea is the proper choice, even those who prefer coffee may feel pressured to follow along. This shows how dominant ideas make certain behaviors or beliefs seem natural, even though they are socially constructed. Gramsci’s insight reminds us that what we often take for granted as “normal” is not a universal truth but a product of cultural and political influence.

❑ Gramsci's theory of power

Gramsci also challenged traditional Marxist ideas by rejecting the notion that economic conditions alone determine history. Instead, he showed how power is maintained through culture and ideas as well as through force or economic control (Hall, Morley, & Chen, 1996). He introduced the concept of a “historic bloc,” where social groups unite around shared values to challenge the ruling class, and the idea of a “war of position,” meaning the gradual building of alternative ideas and institutions within civil society rather than relying solely on sudden revolutions (Haralambos & Holborn, 2013).

Gramsci’s ideas expanded how we think about power and exclusion. He showed that change requires more than just economic shifts; it needs cultural transformation and strong political organization. By focusing on how ideas and culture shape society, Gramsci gave marginalized groups tools to understand and challenge their exclusion.



1.1.3.1.3 Louis Althusser



Fig.1.1.3 Louis Althusser

☐ ISAs and social exclusion

Louis Althusser's theories on ideology and social exclusion provide a critical model for understanding how societal structures perpetuate inequality. Central to Althusser's work is the concept of interpellation, which describes how individuals are "hailed" by social institutions, such as law enforcement or the education system, shaping their identities within an existing ideological framework. For example, when a police officer calls out, "Hey you!", the individual responds not just reflexively, but as a recognition of their identity and place within societal structures. This process, according to Althusser, transforms individuals into subjects who perceive their actions as freely chosen, despite being influenced by external forces. Althusser emphasizes the role of Ideological State Apparatuses (ISAs), such as educational institutions, in reinforcing class structures and contributing to social exclusion. Educational systems, in particular, serve to instill a false consciousness in the working class, preparing them to accept their subordinate roles in a capitalist society (Haralambos & Holborn, 2013). Schools sort students into different social classes, often marginalizing those who do not conform to academic norms, which reinforces inequality and perpetuates exclusion (Taket, 2009). This process occurs both through the formal curriculum and the hidden curriculum, which subtly promotes values aligning with the interests of the ruling class and discourages critical thinking or dissent.

❑ Education and exclusion mechanisms

The mechanisms of social exclusion, as outlined by Althusser, include sorting and classifying students based on perceived abilities, which often leads to the marginalization of working-class students and their eventual exclusion from higher education or meaningful employment (Haralambos & Holborn, 2013; Taket, 2009). Schools reinforce existing power structures by teaching respect for authority, making it difficult for marginalized groups to challenge their exclusion (Haralambos & Holborn, 2013). The cultural narratives within educational institutions, which often glorify certain groups while downplaying the struggles of others, further perpetuate exclusion by shaping collective identity and fostering feelings of inferiority among disadvantaged groups (Silver, 1994; Böhnke & Silver, 2023).

Althusser's theories focus on how social exclusion is not merely an individual issue but a systemic one deeply embedded in societal institutions. His work reveals the complex ways in which identity formation and inequality are intertwined, and how institutions like education serve as powerful tools in perpetuating social exclusion. Understanding these dynamics can shed light on the persistent inequalities that shape modern societies.

1.1.3.1.4. Frank Parkin

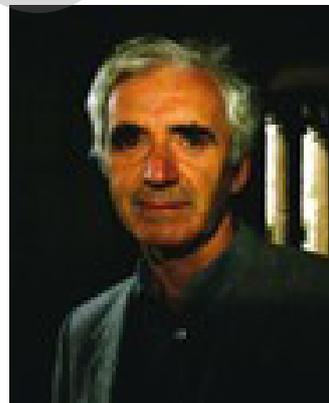


Fig.1.1.4 Frank Parkin

Frank Parkin was a sociologist who introduced the idea of social closure to explain how groups in society keep their privileges and exclude others. This idea moves away from the traditional Marxist focus on class divisions based on work and production. Instead, Parkin suggested that we should look at the strategies groups use to include or exclude others from opportunities, resources, or power. He believed that class is about actions and struggles, not just economic positions. Building on Weber's concept of social closure, Parkin (1983) identified two main forms: exclusionary closure and usurpatory

❑ Exclusionary and usurpatory closure

closure. Exclusionary closure occurs when dominant groups construct barriers—legal, educational, or institutional—that restrict access to valued resources and positions of power. For example, the requirement of specific professional qualifications can exclude individuals without them from high-paying or politically influential occupations, thereby concentrating privilege within a narrow elite (Haralambos & Holborn, 2013). By contrast, usurpatory closure refers to the collective strategies of subordinated groups to challenge and dismantle these barriers. Struggles such as labor movements demanding higher wages or feminist campaigns for equal rights exemplify this form of closure, where marginalized groups mobilize politically to expand access to opportunities and resources (Parkin, 1983).

❑ Dual closure and group dynamics

An important dimension of Parkin's theory is the concept of dual closure, which highlights how social groups can simultaneously engage in both exclusionary and usurpatory practices. For example, skilled workers may restrict access to their professions by excluding unskilled laborers, while at the same time mobilizing collectively to demand higher wages or improved working conditions for themselves. This dual strategy illustrates the complex ways in which social groups operate, challenging the traditional Marxist view that society is simply divided into the bourgeoisie and the proletariat (Parkin, 1983).

❑ Class and strategies of exclusion

Parkin also argued that class should not only be defined by economic roles but also by the strategies people use to include or exclude others. In industrial societies, he identified two common ways this happens: controlling ownership of important resources, like businesses, and using qualifications to block access to certain jobs. By focusing on these strategies, Parkin's theory provides a more flexible way to understand how inequality works in modern societies.

Frank Parkin's social closure theory explains how groups maintain or challenge privileges through strategies of exclusion and resistance. It goes beyond traditional ideas of class and focuses on the actions of people and groups. His work helps us understand that inequality is not just about money or jobs but also about power, strategies, and the struggles people face to improve their lives.

1.1.3.2 Spatial Exclusion Theory

Spatial exclusion happens when some people are unable to get the opportunities, resources, or rights they need because of how spaces like cities or villages are designed and controlled.

□ Edward Soja and David Harvey

Scholars like Edward Soja and David Harvey explain that it's not just about where people live but about how access to important things like jobs, schools, or transport is limited. This exclusion changes over time and affects people differently, often because certain groups block others from accessing spaces and opportunities. It depends on social practices, infrastructure like roads and public transport, and resources like money or skills. In real life, this can mean people face barriers like poor transportation or cultural differences, making it hard to move around, connect with others, or fully participate in society. Understanding these barriers can help us create fairer and more inclusive communities.

1.1.3.2.1 Edward Soja



Fig.1.1.5 Edward Soja

Edward Soja was a geographer who looked at how the spaces we live in affect the way people are treated in society. He focused on the idea that space isn't just about physical places but also about how it influences relationships and creates unfairness, like when some people are left out or treated differently. His ideas helped us see how space can shape lives in ways we might not always notice. One of Soja's central contributions is the concept of Thirdspace, which extends beyond material or imagined spaces to encompass lived experiences. While *Firstspace* refers to the physical and built environment, and *Secondspace* reflects representations such as maps or plans, *Thirdspace* integrates these with the everyday practices and meanings of those who inhabit particular spaces. This frame-

□ Thirdspace and social issues

work reveals how spatial arrangements make visible issues of inequality and exclusion in society (Soja, 2010).

❑ Spatial justice and inclusion

Soja also came up with the idea of spatial justice, which means making sure that spaces are fair for everyone. He showed how spaces can sometimes act like invisible barriers, keeping certain people out or making life harder for them. For example, how cities are planned can decide who gets easy access to jobs, schools, or healthcare. By looking closely at these arrangements, we can find ways to make spaces more inclusive. (Soja, 2010; Harvey, 2009)

❑ Spatial trialectics and interconnectedness

One of Soja's most important contributions was his idea of spatial trialectics. He believed that space, history, and social relationships all work together to shape the world we live in. This means we can't look at just one of these things alone—they're all connected. He also rejected the idea of thinking about space in simple "either-or" terms. Instead, he argued that space is a mix of physical, imagined, and lived realities.

❑ Space as an active force

Soja's work was different from many other geographers because he saw space as an active force, not just a backdrop for human activities. He believed that space influences how society works and how people are treated. His Thirdspace idea is very inclusive, combining facts, personal experiences, and even imagination to understand the world better. By exploring how space shapes our lives, Soja taught us that geography isn't just about maps and places—it's about people and fairness too. His ideas remind us that where we live, work, and play can have a big impact on how we experience life and whether we feel included or excluded.

1.1.3.2.2 David Harvey

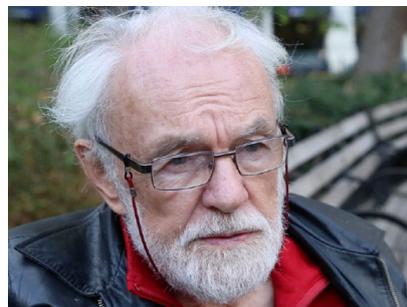


Fig.1.1.6 David Harvey

David Harvey, a famous geographer, explained social exclusion by looking at how cities are built and run under capitalism. He believed that the way cities grow and develop often leaves out poorer or vulnerable people. This happens because

❑ Neoliberalism and social exclusion

city planning under capitalism focuses more on making money than on helping everyone live better lives. Harvey showed that social exclusion happens in many ways. For example, governments and businesses often follow neoliberal policies that prioritize the needs of wealthy people while ignoring the working class (Taket, 2009; Stiglitz, 2013). Big cities sometimes turn public spaces, like parks, into profit-making spaces such as shopping centers. These decisions make it harder for ordinary people to feel like they belong (Harvey, 2009; Böhnke & Silver, 2023).

❑ Gentrification and privatization issues

One major problem Harvey pointed out is how cities handle housing and services. When wealthy people move into poorer neighbourhoods—a process called gentrification—rents rise and long-time residents are often displaced (Harvey, 2009; Silver, 1994). Alongside this, privatization of essential services, such as water or transportation, makes them more expensive and less accessible to marginalized groups (Sen, 1999; Stiglitz, 2013).

❑ Cities, capitalism, and inequality

Harvey's main idea is that cities are not just collections of buildings and streets but systems that can either promote inclusion or deepen exclusion. Under capitalism, cities tend to favour the rich while making life harder for the poor, thereby widening inequalities (Harvey, 2009; Fraser & Honneth, 2003). This creates a visible gap between different groups, with some having greater opportunities and others being left out (Putnam, 2000; DeWalt, 2013). To solve this, Harvey came up with the idea of the "right to the city." He believed everyone should have a say in how cities are designed and run. Instead of letting businesses and money control everything, people living in the city should work together to make it a fair and inclusive place for everyone.

1.1.3.3 Cultural Theory

❑ powerful groups set the rules

Social exclusion happens when people are treated unfairly because of their culture, like their language, religion, or way of life. This often happens because powerful groups set the rules, leaving others out of important things like cultural activities or media representation. According to Pierre Bourdieu, those with "cultural capital" (like education or speaking a certain way) are treated better, while others face barriers. This can lead to loneliness, losing touch with one's culture, and missing out on jobs or politics. It's not just about culture—it also connects to money, social standing, and politics, making life even harder for those excluded.



1.1.3.3.1 Stuart Hall



Fig.1.1.7 Stuart Hall

❑ Racism and systemic exclusion

Stuart Hall was a significant cultural theorist who made valuable contributions to our understanding of social exclusion, particularly in relation to race, identity, and cultural dynamics. Hall's work challenges traditional views of identity, showing that it is not fixed or unchanging. Instead, he argued that cultural identity is a dynamic, ongoing process that is shaped by historical events and power relations. These power structures often influence how different identities are constructed, which can result in the exclusion of certain groups, making some identities more privileged than others. A central part of Hall's work focuses on racism as a mechanism of social exclusion. He explained that racial identities are deeply rooted in historical and colonial contexts, where dominant groups used power to marginalize others (Hall, Morley, & Chen, 1996). This marginalization continues to affect people's sense of belonging and contributes to systemic inequalities in education, politics, and employment. Such inequalities are embedded in broader social structures rather than being merely individual experiences (Crenshaw, 2017; Silver, 1994).

❑ Discourse and cultural identities

In examining how cultural identities are formed, Hall also stressed the importance of discourse—the language and narratives used to describe different groups. He pointed out that the way we talk about identities can either reinforce harmful stereotypes or challenge exclusionary power structures (Hall, Morley, & Chen, 1996). Media and political discourse, for example, can promote either inclusive or exclusionary worldviews. By analyzing how discourse works, Hall revealed the underlying mechanisms of social exclusion, while also calling for inclusive narratives that reflect human diversity (Haralambos & Holborn, 2013).

❑ Diaspora and identity complexities

Another important concept in Hall's work is diaspora. Hall explored how displaced communities—those who have migrated or been forced from their homes—experience identity in complex ways. He highlighted both the shared experiences that unite members of diasporic communities and the differences shaped by their historical and cultural contexts (Hall, Morley, & Chen, 1996). This duality often produces exclusion within diasporic groups as they navigate identity in relation to dominant cultures in their host societies (Putnam, 2000). Stuart Hall's research provides a critical model for understanding social exclusion through the lenses of race, identity, and power. His insights challenge essentialist views of identity and highlight the need for inclusive narratives that recognize the diverse experiences of marginalized groups. By analyzing how discourse shapes our understanding of identity, Hall's work continues to be a powerful influence on contemporary discussions of social justice, equity, and the fight against social exclusion.

1.1.3.4 Network Theory

Social exclusion happens when people don't have the right connections or relationships with important groups. Networks, like friendships and social groups, act as gates—they can either help people join in or leave them out. When someone feels left out, they often rely more on close friends to feel better but might stop talking to others, like family. Not having these network connections can block access to jobs, health care, or support, making life much harder. This isn't just about one person—it's part of bigger power systems and inequalities that shape how connected or excluded someone can be.

1.1.3.4.1. Mark Granovetter



Fig.1.1.8 Mark Granovetter

❑ Weak ties and opportunities

Mark Granovetter's research on social networks plays a crucial role in understanding how social exclusion happens and how individuals can overcome it. His weak tie theory, introduced in his 1973 paper *The Strength of Weak Ties*, explains how different types of social connections affect access to information and opportunities. This theory has important implications for understanding how social exclusion can be mitigated through social networks. Granovetter's weak tie theory suggests that weak ties—relationships with acquaintances, as opposed to close friends or family—are often more valuable for accessing new opportunities. This is because weak ties connect individuals to different social groups, offering a wider range of information and resources than strong ties, which are typically confined to people in the same social circle (Granovetter, 1973; Putnam, 2000). For individuals experiencing social exclusion, such as those facing unemployment or poverty, weak ties can play a critical role in helping them access new job opportunities or resources that they might not find through close-knit relationships (Sen, 1999; Stiglitz, 2013).

❑ Weak ties and overcoming exclusion

In the context of social exclusion, Granovetter's theory shows how marginalized individuals can use weak ties to overcome isolation and connect to broader networks. For example, someone who is out of work might not find new job opportunities within their immediate family or close friends, but weak ties—acquaintances, distant colleagues, or even people they meet through online communities—can provide valuable leads and introductions (Granovetter, 1973). This highlights the importance of building and maintaining weak ties for people at risk of exclusion (DeWall, 2013).

❑ Exclusion, behaviour, and weak ties

Granovetter's work also sheds light on how social exclusion affects people's behaviour. Research indicates that individuals who experience exclusion may react in different ways. Some may become more withdrawn, while others may seek to rebuild their social connections (DeWall, 2013). For those seeking to regain a sense of belonging, weak ties can be an essential resource. They offer a way to reconnect with broader social circles and to access the support and opportunities that are necessary for re-entering social and economic life (Putnam, 2000).

❑ Weak ties and policy solutions

Granovetter's insights into social networks show that social exclusion is not only about being cut off from opportunities but also about the way social structures influence individual behaviour and outcomes. Understanding how weak ties work in social networks can help policymakers and community organizers create strategies to address exclusion (Fraser & Honneth,

❑ Weak ties and social mobility

2003). By focusing on strengthening weak ties, interventions can help marginalized groups connect to resources and opportunities that they might otherwise miss out on (Stiglitz, 2013).

Granovetter's theory has important implications for addressing inequality in society. It suggests that fostering weak ties can be an effective way to reduce social exclusion and promote greater social mobility. For example, community programs that encourage people to build relationships with those outside their immediate social circles can help individuals gain access to valuable information, opportunities, and support networks. Granovetter's weak tie theory offers a model for understanding social exclusion and provides a solution for overcoming it. By emphasizing the importance of weak ties in social networks, his work highlights how individuals can navigate social exclusion and find new opportunities for inclusion. This approach encourages a more inclusive society by recognizing the value of diverse and widespread social connections.

1.1.3.4.2 Robert Putnam



Fig.1.1.9 Robert Putnam

❑ Social capital and societal cohesion

Robert Putnam is an American political scientist best known for his influential work on social capital, particularly through his 2000 book *Bowling Alone: The Collapse and Revival of American Community*. His research focuses on the decline of civic engagement and social connections in the United States, a trend he argues has led to growing social isolation and exclusion. Putnam's work highlights the importance of social relationships and community ties for a healthy, functioning society. One of the central concepts in Putnam's work is social capital, which he defines as the networks, norms, and trust that help people coordinate and cooperate for mutual benefit within their communities. He distinguishes between two types of social capital: bonding social capital, which refers to connections among similar individuals such as family and close friends, and bridging social capital, which connects diverse individuals, helping

to create broader social networks. Putnam argues that both types are essential for building a cohesive society. A decline in bonding capital, he suggests, weakens bridging capital, leading to greater social fragmentation and ethnic tensions (Putnam, 2000; Silver, 1994).

❑ Decline in civic participation

In *Bowling Alone*, Putnam (2000) uses the metaphor of bowling leagues to illustrate the decline in communal activities. While more people are bowling than ever, fewer are participating in leagues, which signifies a broader trend of individuals engaging in activities alone rather than as part of a community. This withdrawal from social life, Putnam argues, has contributed to political apathy, lower trust in institutions, and greater societal unhappiness. The decline in civic participation has serious consequences for democracy, as it undermines the trust and cooperation necessary for a functioning society (Sen, 1999).

❑ Social isolation and polarization

Putnam's research also addresses the implications of social isolation. He argues that low levels of social capital are linked to increased political polarization and declining trust toward institutions. The erosion of community ties not only harms individual well-being but also weakens the fabric of democratic life (Putnam, 2000; Stiglitz, 2013). Without strong social networks, individuals are less likely to engage in civic activities or support democratic institutions, making it harder for society to work together for common goals (Fraser & Honneth, 2003).

❑ Combating social isolation

Recently, Putnam has continued to emphasize the importance of combating social isolation, particularly in today's world where technological changes and shifting cultural norms further alienate people. He advocates for initiatives that foster social connections, especially in environments like workplaces where loneliness has become more prevalent (Putnam, 2000). His work remains relevant as societies seek to rebuild community ties and strengthen the bonds that hold societies together, ensuring greater resilience and a more engaged public (DeWall, 2013). Robert Putnam's research on social capital and its decline offers valuable insights into the causes and consequences of social exclusion in modern societies. His work underscores the importance of rebuilding community connections and encouraging active participation in public life to foster a more engaged and cohesive society.

1.1.3.5 Economic Inequality Theories

❑ differences in wealth, income, and opportunities

Economic inequality refers to the differences in wealth, income, and opportunities between individuals or groups in society. This gap can lead to unequal access to education, healthcare, and basic needs. Various thinkers have offered explanations for why inequality exists. Some, like Amartya Sen, argue that inequality is not just about wealth but also about access to capabilities the freedoms people have to live the kind of life they value. On the other hand, Joseph Stiglitz highlights how markets and governments sometimes fail to ensure fair distribution of resources, often leading to increasing inequality. By exploring these ideas, we can better understand the complex reasons behind economic inequality and how to address it in society.

1.1.3.5.1 Amartya Sen

❑ Social exclusion and capability deprivation)

Amartya Sen, a renowned economist, connects social exclusion to his concept of capability deprivation and poverty.



Fig.1.1.10 Amartya Sen

He explains that social exclusion is not just about being left out; it also limits a person's ability to live a full and meaningful life. When people are excluded, they lose important opportunities and resources, which can harm their well-being and their ability to succeed in society. According to Sen, social exclusion operates across multiple dimensions, including economic, social, and political life. It is closely tied to capability deprivation, which refers to the denial of real freedoms and opportunities that enable individuals to live the kind of life they value. For example,

exclusion from education, employment, or community participation reduces people's choices and restricts their ability to enhance their quality of life (Sen, 1999).

Sen distinguishes between two types of exclusion: active and passive. Active exclusion happens when people are deliberately kept out through specific actions, such as government policies or rules that deny certain groups access to opportunities. For example, immigrants may be excluded from voting or receiving social benefits, which can prevent them from becoming part of

❑ Active vs. passive exclusion

❑ Importance of social inclusion

❑ Inequality and policy impact

society and create further struggles (Sen, 2000). On the other hand, passive exclusion occurs when exclusion happens unintentionally, as a result of larger social systems. For instance, disabled individuals may face barriers like inaccessible schools or workplaces, not because anyone planned it, but because society has not addressed their needs.

Sen also highlights why being included in society is so important. First, social inclusion helps people feel valued and respected, which builds their confidence and self-esteem. Second, having connections with others can provide practical benefits like job opportunities, education, and access to important resources. These connections make life better and create a sense of belonging. Sen's work emphasizes that social exclusion is a major part of poverty. When people are left out of society, they face even more challenges in improving their lives, creating a cycle of poverty and exclusion. By distinguishing between active and passive exclusion, He shows how intentional decisions and systemic barriers both play a role in excluding people. To effectively combat poverty, we need to tackle both economic problems and social barriers, ensuring that everyone has the chance to participate fully in society.

1.1.3.5.2. Joseph Stiglitz

Joseph Stiglitz, a Nobel Prize-winning economist, has studied how unfairness in the economy can lead to people being left



Fig.1.1.11 Joseph Stiglitz

out or excluded. He says that inequality doesn't just happen naturally but is the result of choices made by those in power. These decisions create rules that favour the rich and big businesses, making it harder for ordinary people to get ahead. Stiglitz believes this unfair system prevents many people from having the same opportunities to

succeed. Stiglitz explains that the high levels of inequality in countries like the United States are due to policies that have been in place for a long time. For example, rules have made it harder for workers to demand fair wages, allowed large companies to dominate industries, and created a tax system where wealthy people pay less than they should. This setup means that people often stay stuck in the same situation as their parents, no matter how hard they try to improve their lives (Stiglitz, 2012).

❑ Rent-seeking and inequality

One of Stiglitz's big ideas is about rent-seeking, which is when companies or individuals try to make money without actually creating anything useful. For example, some businesses use laws to protect their profits while making life harder for others, like students struggling to pay off loans. Stiglitz calls this an "inequality trap," where unfair systems keep making inequality worse over time.

❑ Stiglitz's solutions for a fairer economy

To address these problems, Stiglitz proposes the idea of a people-centered economy. He argues that economic systems should focus on ensuring fairness and improving well-being for all, rather than privileging a small elite. His recommendations include reforming the tax system to make it more progressive, strengthening labour rights, ensuring corporate accountability, and designing regulations that promote fairness instead of exploitation. Such reforms, he suggests, would allow the benefits of economic growth to be shared more broadly, thereby reducing exclusion and inequality (Stiglitz, 2012). Joseph Stiglitz shows how inequality is connected to the rules and policies that shape economies. He believes that by changing these policies, we can create a fairer society where everyone has a chance to succeed, no matter where they come from. His ideas remind us that the economy should work for everyone, not just a few at the top.

1.1.3.6 Intersectionality Theory

Intersectionality is a way to understand how people's identities like their race, gender, class, or abilities combine to shape their experiences of fairness or unfairness. Kimberlé Crenshaw created this idea in 1989 to show how these identities don't work alone but overlap, creating unique challenges for some people. For example, a woman of colour might face different struggles than a white woman or a man of colour because her race and gender work together in shaping her life. Intersectionality also looks at how systems, politics, and stereotypes can add to these problems. It's not about comparing who has it worse but understanding how different unfair treatments work together in a person's life.

1.1.3.6.1. Kimberlé Crenshaw

Kimberlé Crenshaw is a famous civil rights advocate and scholar who introduced the idea of intersectionality in 1989. Intersectionality explains how different parts of a person's identity—like their race, gender, class, or sexuality—work together to create unique experiences of unfair treatment. Crenshaw's idea shows that we can't fully understand some-

❑ Intersectionality and overlapping identities.

one's challenges by looking at just one part of their identity. For example, a Black woman might face discrimination that is different from what a Black man or a white woman experiences because her race and gender combine in unique ways. Crenshaw created the idea of intersectionality to solve a problem she saw in how people talked about inequality. She noticed that systems like courts or laws often looked at race and gender as separate issues. This meant they ignored the specific challenges faced by people like Black women, whose lives are shaped by both at the same time. In her famous paper, *Demarginalizing the Intersection of Race and Sex*, Crenshaw explained that ignoring these overlaps leads to incomplete solutions and leaves some people's struggles invisible.



Fig.1.1.12 Kimberle Crenshaw

❑ Intersectional inequalities multiply

The idea has since become central to social justice movements. Intersectionality highlights that inequalities do not simply add up—they often multiply, producing compounded disadvantages (Crenshaw, 2017). For example, a Black woman may face challenges that are qualitatively different from those experienced by Black men or white women. Understanding these intersections helps us design more inclusive policies.

Not everyone agrees with the idea of intersectionality. Some critics say it could divide people or make it seem like certain groups are always worse off. However, Crenshaw explains that intersectionality isn't about blaming anyone or ranking who has the hardest life. Instead, it helps us understand and include everyone's experiences, especially those who are often overlooked. Crenshaw's work on intersectionality has changed how we think about fairness and inclusion. By showing how identi-

❑ Intersectionality aims for inclusivity

ties overlap, she has helped people see the unique struggles of those at the crossroads of different unfair systems. Her ideas are still used today to fight for justice and equality, making sure that everyone's story is heard and understood.

1.1.3.7 Multidimensional Theory of Justice

❑ redistribution, recognition, and representation

Nancy Fraser's Tripartite Theory of Justice looks at three important ideas to make society fairer: redistribution, recognition, and representation. Redistribution is about making sure everyone has enough resources, like money, education, and healthcare, to live a good life. Recognition is about respecting and valuing people's identities, especially their cultures and backgrounds, and treating everyone with fairness. Representation means giving everyone a voice in decisions that affect their lives, making sure no one is left out or ignored. These three ideas are all connected and help us understand how to create a fairer society where everyone can participate equally.

1.1.3.7.1 Nancy Fraser



Fig.1.1.13 Nancy Fraser

❑ Social exclusion includes cultural, political factors

Nancy Fraser's perspective on social exclusion connects deeply to her broader theories of justice, which focus on redistribution, recognition, and representation. She sees social exclusion as a complex issue arising from economic, cultural, and political dimensions that hinder individuals from fully participating in society. For Fraser, addressing exclusion requires tackling injustices across all these dimensions to foster equality and inclusion. Fraser defines social exclusion as more than just economic deprivation. It encompasses cultural and political barriers that prevent individuals from being recognized as equal participants in social life. One form of exclusion she highlights

is misrecognition, where entrenched biases deny certain groups the acknowledgment and respect they deserve, perpetuating social inequalities (Fraser & Honneth, 2003).

❑ Economic, cultural, political exclusion

She identifies three key dimensions of social ordering that contribute to exclusion. The economic dimension concerns unequal access to resources and opportunities, the cultural dimension involves societal norms and values that marginalize specific identities, and the political dimension addresses unequal representation and lack of voice in decision-making processes. Together, these dimensions create overlapping and reinforcing forms of exclusion (Fraser & Honneth, 2003).

❑ Status, misframing, exclusion

Fraser's status model of recognition focuses on how institutionalized cultural values assign inferior status to some groups, limiting their ability to participate equally in society. She also introduces the concept of misframing, which refers to political boundaries being drawn in ways that exclude marginalized groups from discussions about justice. This exclusion compounds disadvantages, denying these groups access to critical resources and representation.

Nancy Fraser's analysis of social exclusion emphasizes its multidimensional nature and the need for a holistic approach to justice. By addressing economic inequality, cultural misrecognition, and political exclusion simultaneously, Fraser advocates for a society where all individuals can fully participate and be treated as equals. Her work serves as a powerful framework for creating inclusive policies and practices that ensure justice for all.

1.1.3.8 Moral Underclass Theory

Charles Murray's Moral Underclass Theory argues that social exclusion results from certain groups being seen as morally deficient, rather than due to economic factors. He suggests these groups, often labeled the "underclass," are marked by welfare dependency, high rates of illegitimacy, and rejection of the work ethic. Murray believes social welfare programs create a "culture of dependency," perpetuating a cycle of poverty and exclusion, blaming these groups' behaviour for their social position. Ruth Lister critiques this view, arguing that social exclusion is caused not only by individual moral failings but also by systemic issues like poverty and inequality. She calls for policies that address these broader structural factors and offer equal opportunities for all.

1.1.3.8.1. Ruth Lister



Fig.1.1.14 Ruth Lister

❑ Four dimensions of exclusion

Ruth Lister is a sociologist who has greatly influenced our understanding of social exclusion, particularly how it goes beyond just being poor. She explains that social exclusion is when people are prevented from fully participating in society, which affects their ability to access important resources, opportunities, and rights (Lister, 2004). According to Lister, social exclusion is a complex issue that involves many factors, such as economic, social, political, and cultural barriers, which stop people from being able to take part in society as equals. Lister (2004) identifies four key dimensions of social exclusion: impoverishment, labour market exclusion, service exclusion, and social relationship exclusion. Impoverishment refers to people not having enough money or resources to meet their basic needs. Labour market exclusion means not having access to jobs or employment opportunities, which can happen due to things like discrimination or lack of skills. Service exclusion occurs when people are unable to access important services like education, healthcare, and welfare, which are necessary to improve their lives. Social relationship exclusion involves being left out of social networks and political processes, making it harder for people to have a voice in their communities.

❑ Exclusion beyond poverty

Lister's work also challenges traditional views that focus only on economic poverty. She shows that people who may not be poor in terms of money can still face exclusion due to other factors, such as racism, sexism, or disability. These social barriers

ers can keep people out of important activities and opportunities even if they have financial resources, making exclusion a much broader issue than just income.

❑ Structural causes of exclusion

Her theory highlights that social exclusion is not just an individual problem but a structural one. This means it's caused by wider social systems and practices, not just by personal failure or choices (Lister, 2004). Lister believes that to tackle social exclusion, we need to look at these larger systemic issues, rather than blaming people for their exclusion. Understanding this helps policymakers create better solutions to fight inequality and ensure everyone can take part in society. Ruth Lister's work provides a more detailed understanding of social exclusion. It's not just about being poor but also about how different factors like job access, health services, and social participation can keep people on the outside. Her research pushes us to think about social exclusion as a multi-dimensional problem that needs broad, systemic solutions. By addressing these issues, we can help create a society where everyone can participate fully.

1.1.3.9 Distributive Justice Theory

❑ Resources, goods, and opportunities are shared fairly

Distributive justice is about making sure that resources, goods, and opportunities are shared fairly in society. It looks at how we can divide things like money, education, and healthcare so that everyone gets what they need. There are different ways to think about fairness in distribution: some believe everyone should get the same amount (equality), others think resources should go to those who need them the most (need-based), some think people should get more if they've worked harder or done more (merit), and some think the amount should depend on how much effort someone puts in (proportionality). Philosophers like John Rawls believe advantages shouldn't depend on things like luck or where you were born, while Robert Nozick thinks fairness comes from fair exchanges rather than fixed outcomes. Distributive justice helps create a fair society by balancing what individuals contribute with what they need.

1.1.3.9.1 John Rawls

Fig.1.1.15 John Rawls

John Rawls' ideas on social exclusion are closely tied to his broader theories of justice, particularly his difference principle from *A Theory of Justice*. This principle allows for inequalities only if they benefit the least advantaged members of society. By emphasizing the improvement of conditions for

marginalized groups, Rawls' model directly addresses the root causes of social exclusion and promotes inclusion.



Fig.1.1.15 John Rawls

❑ *Veil of ignorance ensures fairness)*

A central part of Rawls' theory is the veil of ignorance, a thought experiment that asks individuals to design the rules of society without knowing their own social status or abilities (Rawls, 2019). This ensures fairness because no one would choose rules that disadvantage themselves if they were among the least privileged. This idea promotes the creation of a society where fairness and equitable opportunities are central, helping to prevent social exclusion.

❑ Just institutions combat exclusion

Rawls also emphasizes the importance of just social institutions in addressing exclusion. According to him, institutions should ensure that primary goods—such as liberty, opportunity, income, and self-respect—are distributed equally unless inequalities benefit the least advantaged (Rawls, 2019; DeWall, 2013). This approach requires institutions to actively work toward including marginalized groups rather than ignoring or perpetuating their exclusion.

In areas like health and capability, Rawls recognizes the need for individuals to have basic resources to pursue their goals (Rawls, 2019). However, critics point out that his model assumes a baseline level of health and intelligence that some individuals, due to factors like genetics or poverty, may not meet (Sen, 1999). This raises questions about how Rawls' theory addresses those most at risk of exclusion due to severe health or capability disadvantages. John Rawls provides a strong theoretical foundation for tackling social exclusion through his focus

❑ Critique of capability assumptions

on fairness and the needs of the least advantaged. By advocating for equitable institutions and fair opportunities, his framework offers a vision for a more inclusive society. However, addressing health and capability disparities remains a challenge, highlighting areas for further refinement in ensuring everyone's full participation in societal life.

The Gap in Disability Inclusion



Did you know that in India, only 36% of people with disabilities have jobs? Even in Kerala, the first state to introduce a State Disability Policy, many public spaces and government buildings are still not accessible to people with disabilities, showing that even progressive policies can't always overcome physical barriers. (Source: UNDP India)

1.1.4 The Debates on Social Exclusion

Social exclusion isn't just about lacking resources—it's about being left out of meaningful participation in society. People may access education but still face barriers like job discrimination, showing that inclusion and exclusion are deeply connected. Marginalized groups struggle with systemic issues like economic inequality, social biases, and psychological stress, which prevent full integration. Globalization often worsens these challenges by increasing local inequalities, but innovative policies can help. Cities like Bogotá and Medellín have reduced poverty and improved education, while programs like the UN's Sustainable Development Goals demonstrate how global and local efforts can work together to create a more inclusive world.

1.1.4.1. Inclusion vs. Exclusion

❑ Interconnected inclusion and exclusion

The debate on inclusion and exclusion goes beyond simply providing access to resources—it focuses on fostering meaningful participation and empowerment. While inclusion may open doors in areas like education, individuals can still face exclusion in other aspects, such as employment or housing. For instance, a person may earn a degree but struggle to find a job due to systemic biases. This dynamic shows that inclusion and exclusion are not binary but interconnected processes shaped by structural inequalities, like discrimination based on race, gender, or economic status. The challenge is to create systems that address these barriers holistically, ensuring equitable opportunities for all.

1.1.4.2 Social Integration and the Role of Society

❑ Barriers to inclusion

Marginalized groups face significant challenges that make it difficult for them to integrate into society. Structural barriers, such as exclusion from political participation and discrimination based on race, gender, or age, create systemic inequalities. Economic barriers like low incomes and limited access to jobs, education, and basic services worsen the situation. Social barriers, including biases against appearance, language, or lifestyle, add to these struggles. For example, immigrants often deal with language barriers, unrecognized qualifications, and limited social networks. Psychological hurdles like minority stress, fear of failure, and low self-esteem further hinder progress, while systemic issues like stigmatization and segregation deepen exclusion. Addressing these challenges requires fair and compassionate policies that break down these barriers and foster meaningful participation in society.

1.1.4.3 Global vs. Local Perspectives on Exclusion

Globalization and social exclusion are deeply connected but manifest differently at local and global levels. Global economic trends often amplify local inequalities, such as widening the gap between rich and poor in cities like Johannesburg and Faisalabad (Stiglitz, 2013; Sen, 1999). People view globalization in varied ways—some celebrate free markets, others criticize persistent inequalities, and some see globalization as a constantly shifting system of hierarchies (Harvey, 2009; Silver, 1994). Social exclusion is multifaceted, involving unfair practices, resource inequalities, and barriers to participation (Sen,

❑ Globalization and exclusion

2000; Taket, 2009; DeWall, 2013). However, local efforts can counter these challenges. Cities like Bogotá and Medellín have implemented policies to reduce poverty, improve infrastructure, and boost education (Soja, 2010; Lister, 2004). In Durban, South Africa, unused spaces were turned into childcare centers, supporting women in informal sectors (Fraser & Honneth, 2003; Crenshaw, 2017). Global and local strategies, like the UN's Sustainable Development Goals and community-driven initiatives such as the Community Upgrading Fund, show how inclusive development can address exclusion at all levels (Putnam, 2000; Böhnke & Silver, 2023).

1.1.4.4 Challenges of Social Exclusion

❑ Issues with social exclusion

The concept of social exclusion helps us understand inequality and marginalization, but it has its problems too. One issue is that it can be hard to define because it covers so many situations, like poverty, discrimination, and lack of access to resources. While social exclusion goes beyond poverty, such as addressing racism or sexism, the overlap between the two can confuse policymakers and make it hard to solve specific problems. Critics also say the idea isn't based on a strong theory and often focuses too much on individual experiences rather than the bigger systems that create inequality. For example, welfare programs might try to help but could also make people feel dependent or left out instead of truly empowering them. Another challenge is measuring social exclusion because it involves so many aspects—like money, relationships, and discrimination. Without clear ways to track it, it's tough to tell if policies are working. Although social exclusion has helped shine a light on unfairness, its unclear definitions and practical problems limit its impact. To create better solutions, we need clearer ideas, stronger theories, and smarter policies that value everyone's experiences.

Summarised Overview

Social exclusion is a systemic process where individuals or groups are marginalized, often denied access to opportunities, rights, and resources due to factors such as poverty, discrimination, or structural barriers. This exclusion impacts their ability to participate fully in society, affecting dimensions like education, employment, social networks, and cultural inclusion. Through this chapter we explored main theories and paradigms, such as Marxist, Spatial Theory, and network approaches, highlighting the interconnected causes and effects of exclusion. It also emphasizes practical strategies, including global and local initiatives, aimed at fostering inclusion and equity. Understanding and addressing social exclusion requires a multidimensional approach that combines economic, cultural, and political solutions to create a fairer, more cohesive society.

Self-Assessment Questions

1. Define social exclusion and explain its significance in understanding societal inequalities.
2. Analyze how cultural exclusion affects marginalized communities in urban and rural areas.
3. Compare the Monopoly Paradigm with the Specialization Paradigm of social exclusion.
4. Discuss the role of spatial exclusion in shaping access to resources in urban settings.
5. Explain how Amartya Sen's capability approach relates to social exclusion.
6. Examine the impact of social exclusion on mental health with specific examples.
7. Explore Kimberlé Crenshaw's theory of intersectionality and its connection to social exclusion.
8. Evaluate the effectiveness of global initiatives like the UN's Sustainable Development Goals in reducing social exclusion.
9. Describe the concept of solidarity in combating social exclusion as per the Solidarity Paradigm.

Assignments

1. Define social exclusion and discuss how it reinforces societal inequalities across economic, political, and social spheres, with examples from marginalized groups.
2. Examine cultural exclusion in urban and rural settings, highlighting its impact on marginalized communities' access to resources, opportunities, and social integration.
3. Analyze the Monopoly Paradigm and the Specialization Paradigm of social exclusion, focusing on their differences and how they explain the exclusion of certain groups
4. Explore spatial exclusion in urban areas, examining how urban planning and geographical isolation affect access to housing, education, and healthcare
5. Discuss Amartya Sen's capability approach and its role in understanding social exclusion, focusing on how it highlights barriers to participation and well-being.
6. Investigate the psychological effects of social exclusion on marginalized groups, including mental health challenges like depression, anxiety, and disempowerment.
7. Discuss Kimberlé Crenshaw's theory of intersectionality and its connection to social exclusion, analyzing how overlapping identities shape exclusion experiences.

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU

UNIT 2

Marginalization: Social, Economic and Political Perspectives

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ comprehend the concept of marginalization from social, economic, and political perspectives
- ▶ analyze the causes and impacts of marginalization on different groups in society
- ▶ explore the intersectionality of marginalization and its effects on social inclusion
- ▶ examine strategies to address and reduce marginalization in various spheres of life

Background

Envision a community where some people live in brightly lit homes, walk through spacious, clean streets, and have access to the best education, healthcare, and jobs. Now picture another group of people living in the shadows, hidden away from the opportunities enjoyed by the first group. They live in cramped spaces, walk through unsafe streets, and face barriers that keep them from even basic services. These two groups might live in the same city, but their experiences of life are worlds apart. This is the reality of marginalization, where some are pushed to the fringes of society, denied the resources and opportunities that would allow them to thrive.

Marginalization is not just about physical distance; it's about being invisible in a society that doesn't fully recognize your needs or contributions. In India, for example, millions of people from lower castes or certain tribal communities still face barriers that prevent them from accessing quality education, healthcare, or even clean water. Despite laws that promise equality, the weight of history, culture, and economic structures continues to keep many at the edges of society, much like characters who are stuck in the background of a story that everyone else is living out loud.

Take the story of Rani, a woman from a remote village in India. She dreams of becoming a teacher but is bound by the chains of economic hardship and limited access to education. Her family can't afford the tuition fees, and her community lacks the in-



frastructure to support her dreams. Rani's story is not unique; it's the story of millions who are held back by social and economic forces. These barriers aren't just about a lack of money—they're about a deeper form of exclusion that operates through systems and structures that marginalize certain groups based on factors like caste, gender, and poverty.

On a political level, consider how often marginalized groups find themselves without a voice in decisions that directly impact their lives. In many parts of the world, women, indigenous communities, and people with disabilities struggle to have their concerns addressed by those in power. It's like trying to speak up in a room full of people, but no one listens to you because your voice isn't considered important or relevant. Politicians and leaders may promise change, but without representation, the promises often remain unfulfilled. These are not just isolated stories—they reflect a larger pattern of exclusion that stretches across societies, affecting people's ability to thrive, to be heard, and to change their own futures.

Marginalization happens in many ways—through exclusion from social networks, economic opportunities, and political representation. It's a process that builds slowly, layer by layer, like a wall that separates those who have from those who have not. In this chapter, we will look at the various ways marginalization plays out in our world today. We'll explore how social, economic, and political forces work together to create and sustain inequality.

Keywords

Marginalization, social exclusion, economic inequality, political power, social justice, discrimination

Discussion

Marginalization is the process through which certain groups of people are pushed to the edges of society and denied equal participation in opportunities such as education, employment, and decision-making. It is not only about social exclusion but also about the unequal distribution of power, resources, and rights. People may experience marginalization because of their caste, class, gender, disability, race, or economic status. This often leads to discrimination and creates a feeling of invisibility within the larger social and political framework.

Marginalization goes beyond individual experiences; it reflects deeper structural issues that affect how societies are organized. Those who are marginalized face constant barriers that restrict their choices and opportunities in life. In political science, the study of marginalization is important because it reveals how power, justice, and equality function in society and why the inclusion of all citizens is essential for building a fair and democratic system.

1.3.1 Marginalization

❑ Marginalization excludes people from society

Marginalization is when certain people or groups are treated as unimportant and left out of society. This happens when they don't get the same opportunities, rights, or services as others, making it harder for them to have a say in decisions that affect their lives. As a result, they often get left behind and don't have the power to change their situation. It's like being pushed to the edge of society, where they can't access the things they need, like jobs, education, or even being heard in important conversations.

Mother Teresa—The Mother of the Forgotten



Did You Know? Mother Teresa wasn't just a caregiver; she was a beacon of love for those society left behind. Known as the "Mother of the Destitute," she believed the greatest poverty wasn't about lacking food or shelter—it was feeling unloved and unwanted. Through her Missionaries of Charity, she turned compassion into action, creating homes where the abandoned, the dying, and the overlooked found dignity, care, and belonging. Her work wasn't just charity; it was a loud, loving message to the world: everyone matters.

❑ Marginalization pushes people to the edge of society

❑ "Marginalization" and "marginal man" in migration studies

❑ Marginalization, inequality, and efforts to address it

The concept of marginalization originates from the word *margin*, metaphorically describing the act of pushing people away from the center towards the social periphery. Initially, it referred to the literal margins of a paper, but evolved to describe the process of treating certain groups as insignificant by isolating and disempowering them.

The term "marginalization" became more important in academia through studies of migration in the 1920s and 1930s. Scholars like Park and Stonequist introduced the idea of the "marginal man," which referred to people who try to live between two different cultures. These individuals often face confusion and stress because they feel like they belong to neither culture completely, experiencing conflict and uncertainty as they try to fit in (Varghese & Kumar, 2022).

Marginalization is when certain groups of people are unfairly pushed out of the main parts of society, like having less power, fewer opportunities, or being ignored in history. This has happened for a long time, especially in places like India, where factors such as caste, ethnic differences, and job discrimination have kept people from having equal chances. Marginalized groups often face limited access to economic resources, jobs, political participation, and cultural recognition (Deshpande, 2006; Varghese & Kumar, 2022). Historically, these unfair practices were normalized because societal systems, including laws and institutions, supported them. Today, efforts to address marginalization include legal reforms, awareness campaigns, and policies aimed at ensuring inclusion and equal opportunity for all (Ciaian & Kancs, 2018; Tanha et al., 2024; Smye et al., 2023).

1.3.2 Characteristics of Marginalization .

Marginalization refers to the process of excluding certain individuals or groups from full participation in society, limiting their access to resources, opportunities, and decision-making power. Main characteristics include:

- ▶ Exclusion from education, healthcare, and employment.
- ▶ Denied platform in political and social decisions.
- ▶ Feelings of isolation, insignificance, and rejection.
- ▶ Restricted access to education and jobs.
- ▶ Lack of representation in leadership and media.

❑ Characteristics of Marginalization

Marginalization excludes individuals or groups from society, denying them access to education, healthcare, and jobs. It silences their voices in political and social decisions, leaving them powerless and isolated. With little representation in leadership or media, their struggles remain unseen, perpetuating cycles of inequality and exclusion.

❑ discrimination, disparities and exclusion

1.3.3 Causes of Marginalization

The causes of marginalization are deeply rooted in societal structures and practices that create and sustain inequality. These include discrimination, economic disparities, exclusion from power, historical legacies, and biases against certain identities, all of which work together to deny equal opportunities and rights to marginalized groups.

❑ discrimination and inequality

a. Discrimination

Prejudice rooted in race, gender, caste, class, religion, and other social identities fosters exclusion and perpetuates unequal treatment in various aspects of life. This manifests in harmful practices such as racism, sexism, casteism, classism, religious intolerance, and stigmatization, which systematically deny individuals their rights, dignity, and opportunities, reinforcing cycles of discrimination and inequality.

❑ economic inequality and exclusion

b. Economic Inequality

Widening gaps in wealth and income deepen social divides, creating significant barriers to accessing essential resources and opportunities. Poverty and the unequal distribution of wealth further entrench marginalization, leaving disadvantaged groups with limited means to improve their circumstances and break free from systemic inequality.

❑ Social and political marginalisation

c. Social and Political Exclusion

Systemic barriers within governance and societal structures frequently silence marginalized groups, denying them participation in decision-making processes. This political exclusion reinforces social stratification, ensuring that inequality and power imbalances remain deeply entrenched.



d. Historical and Global Factors

- ❑ historical and global dynamics

The lasting impacts of colonialism, combined with the forces of globalization, have marginalized certain communities by displacing their cultures, exploiting their resources, and exacerbating existing inequalities. These historical and global dynamics continue to perpetuate economic and social disparities, making it harder for affected groups to regain their agency and opportunities.

e. Identity-Based Exclusion

- ❑ sexual orientation, disability, and age

Factors such as sexual orientation, disability, and age often lead to targeted exclusion, as societal norms and prejudices fail to recognize and accommodate diverse identities. This exclusion creates additional barriers, limiting opportunities and reinforcing the marginalization of those who don't conform to conventional expectations.

The Glass Ceiling and Glass Escalator

Did you know that some people face invisible barriers in their careers, while others get a boost? The "glass ceiling" is an invisible barrier that prevents women and minorities from reaching higher positions, even when they're qualified. On the other hand, the "glass escalator" quickly promotes men in jobs mostly held by women, like nursing or teaching, even without extra experience. These concepts highlight how some people are held back by unfair limits, while others are given unearned advantages, making the system unequal for all.

1.3.4 Marginalisation Vs. Exclusion

Marginalization and exclusion are terms used to describe how certain groups or individuals are treated unfairly and pushed to the edges of society. While these terms are related, they have slightly different meanings. Exclusion is about being completely shut out from important parts of life, like work, social connections, or culture. Marginalization, on the other hand, means being pushed to the side or kept out of the main activities in society, even though you are still part of it in some way.

❑ Exclusion affects jobs, social life, and culture

❑ Marginalization limits access to opportunities

❑ Social, economic, and political marginalization exclude people from key aspects of life

Exclusion can occur in many forms. Some people are excluded from economic activities, meaning they cannot find good jobs or earn enough to live comfortably. Others may be excluded socially, meaning they lack access to friendships, community support, or networks. Exclusion can also be cultural, where certain groups are left out of important cultural activities or even ignored in history and politics (Deshpande, 2006; Bleich et al., 2019). Experiencing exclusion often leads to feelings of isolation and loneliness and can make it difficult for individuals to improve their lives (Smye et al., 2023).

Marginalization is a special kind of exclusion. It happens when certain groups or people are pushed to the edge of society, limiting their access to things like work, healthcare, or education. Marginalization can happen for many reasons, like race, income, gender, or lack of political power. For example, a group of people might not be able to get a job or go to school because of who they are or where they come from. This makes it harder for them to succeed and grow.

| Aspect | Exclusion | Marginalization |
|---------------------|---|--|
| Definition | Denial of full participation in society | Being pushed to the periphery |
| Focus | Broader societal participation | Specific groups facing systemic barriers |
| Types | Economic, social, cultural | Social, economic, political |
| Consequences | Social isolation, poverty | Lack of agency, intergenerational disadvantage |

There are different types of marginalization. Social marginalization happens when people are excluded from social activities and community life, leaving them without support. Economic marginalization refers to when people can't get good jobs or access financial services, making it hard to earn money and support themselves. Political marginalization occurs when people are not allowed to vote or take part in decisions about their lives, meaning they have no voice in their own future.



Both marginalization and exclusion are serious issues that can harm individuals and communities. They stop people from being able to fully participate in society, which can lead to feelings of isolation and lack of opportunity. Understanding these issues is important for creating a fairer and more inclusive world, where everyone, no matter who they are, has a chance to succeed and be heard.

1.3.5 Types of Marginalization

Marginalization can occur in three main ways. Social marginalization happens when people have limited access to community spaces and services, making it hard for them to connect with others. Economic marginalization means they have fewer opportunities to work or benefit from the economy, often facing poverty or unemployment. Political marginalization occurs when individuals cannot participate in decision-making or influence political processes. These types of marginalization are closely linked and contribute to inequality in society.

1.3.5.1 Social Marginalization

Social marginalization happens when certain people or groups are unfairly excluded from society. This means they don't have the same opportunities to use resources, enjoy basic rights, or take part in everyday life like others. Marginalization usually affects people based on things like their race, gender, religion, or economic situation. Society, either knowingly or unknowingly, creates rules or beliefs that label some people as "outsiders," making them feel like they don't belong. This unfair treatment can make people feel isolated and powerless, increasing inequality in society.

❑ people as "outsiders,

❑ Marginalization creates unfair barriers

When people are marginalized, they miss out on essential opportunities, such as employment, education, healthcare, and participation in decisions that affect their lives (Varghese & Kumar, 2022; Tanha et al., 2024). For instance, someone may be denied a job or educational opportunity due to their appearance, background, or social identity. This not only disadvantages individuals but also harms society by limiting the potential contributions of these groups (Ciaian & Kanacs, 2018). Marginalization manifests through stereotypes, prejudices, discriminatory policies, and other barriers that hinder people's ability to succeed, creating a cycle of disadvantage that is difficult to break (Sasaki & Baba, 2024).

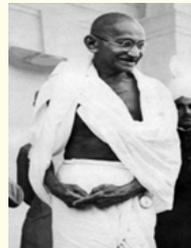
❑ Marginalization leads to poverty, isolation, and limited opportunities

❑ Education can reinforce marginalization

Marginalization has harmful consequences that can deeply affect people's lives. It often leads to poverty, social isolation, and reduced opportunities for personal or economic growth (Varghese & Kumar, 2022; Smye et al., 2023). People who experience marginalization may feel powerless, invisible, and trapped in systemic disadvantage. The severity of these effects varies depending on cultural, economic, and social contexts, highlighting the need for interventions to promote inclusion and equity in society (Ciaian & Kancs, 2018; Tanha et al., 2024).

One area where marginalization is particularly harmful is in schools. While schools are meant to be places of learning and inclusion, they often unintentionally contribute to social marginalization. Some policies and practices in education affect students from disadvantaged backgrounds, making it harder for them to succeed. For example, schools in poorer areas often have less money, which leads to outdated facilities, fewer materials, and fewer qualified teachers. This lack of resources makes it difficult for students from poorer backgrounds to compete with their wealthier peers who have better opportunities.

Gandhi's Concept of Sarvodaya -Upliftment for All



Did you know that Gandhi's concept of Sarvodaya, meaning "universal upliftment," wasn't just about improving people's material conditions, but also about moral and spiritual growth? Gandhi believed that true progress could only be achieved when every individual, especially the most disadvantaged, experienced both economic and ethical development. He saw Sarvodaya as a vision for a society where compassion, non-violence, and self-reliance were as important as wealth and success, aiming for a world where everyone thrives together, not just a few.

❑ Cultural norms contribute to exclusion and inequality

Cultural norms also play a significant role in marginalization. These norms create boundaries between groups, often giving more power and privileges to certain groups while excluding others. In schools, this can show up in the curriculum, which often reflects the values and experiences of dominant social groups, leaving out the perspectives of marginalized communities. It can also affect how students are treated, with minority students sometimes facing harsher punishments or being pushed into lower-level classes. These cultural norms lead to stereotypes, prejudice, and the social isolation of marginalized groups, making it harder for them to succeed and be included in society.

❑ Marginalization differs in rural vs. urban areas

Social marginalization looks different in rural and urban areas because of their unique challenges. In rural areas, people often feel left out because they live far away from important services like schools, hospitals, and good jobs. Many depend on farming, which can be unstable, and some leave for cities to find better opportunities. In cities, the problem is more about competition and inequality. People might be left out because of their social background or status, and overcrowding makes it harder to access resources like housing and jobs. While rural areas face slow decline due to isolation, cities deal with rapid changes that create deeper social divisions and competition.

❑ Racial marginalization limits opportunities and success

1.3.5.1.1 Racial Marginalization in the US

Racial marginalization in the United States is a big problem, especially for Black Americans and other minorities. These groups are often left out of important opportunities, like living in certain neighborhoods, accessing good schools, or getting fair treatment in hospitals and courts. For example, many Black Americans report facing discrimination in healthcare, and they often have fewer chances for quality education and jobs. This unfair treatment creates a cycle where these communities stay at a disadvantage, unable to fully grow or succeed. Over time, this hurts not just the people affected but also society, which misses out on their talents and ideas.

1.3.5.1.2 Indigenous Peoples in Canada

Indigenous Peoples in Canada face numerous challenges due to the lasting effects of colonialism and systemic discrimination. They often earn lower incomes, have fewer employment opportunities, and experience higher levels of poverty

❑ Indigenous peoples face systemic challenges and discrimination

compared with non-Indigenous Canadians (Smye et al., 2023). Many also struggle with serious mental health issues, including elevated rates of suicide, particularly among young people, as well as substance use problems (Smye et al., 2023). These challenges are closely linked to historical trauma, such as the legacy of residential schools, which disrupted families and eroded cultural practices. Indigenous Peoples also face unfair treatment in the criminal justice system, higher risks of violence, and limited access to quality education, healthcare, and housing (Smye et al., 2023). Collectively, these barriers make it difficult for Indigenous communities to achieve social and economic development.

1.3.5.1.3 Roma Communities in Europe

Sr. Rani Maria—A Voice for the Marginalized



Sr. Rani Maria turned forgotten villages into thriving communities by challenging social exclusion head-on. She didn't just empower marginalized groups like adivasis and Dalits; she gave them tools to reclaim their dignity. From organizing self-help groups to exposing exploitative moneylenders, her grassroots activism uplifted over 20,000 lives across 15 villages. Her work was so transformative that Kala Pani, once a symbol of despair, became "Anand Nagar" (City of Joy). Tragically, her fearless fight for inclusion cost her life, but her legacy continues as a beacon of hope for the marginalized. Her life experience is depicted in the movie title as *The face of the faceless*.

Roma communities in Europe endure significant social and economic hardships, deeply rooted in historical discrimination and reinforced by systemic barriers. Many Roma live in extreme poverty, with approximately 90% at risk and lacking access to essentials such as healthcare, clean water, and electricity (Ciaian & Kancs, 2018). These challenges are compounded by two major obstacles: exit barriers, which arise from cultur-

❑ Roma communities face poverty, discrimination, and exclusion

al norms that encourage separation from mainstream society, and entry barriers, including widespread prejudice in education, employment, and social services (Ciaian & Kancs, 2018). Together, these barriers create a cycle of exclusion, confining Roma communities to segregated neighborhoods, high unemployment, and limited educational opportunities. This persistent marginalization not only restricts individual potential but also hampers their integration into broader society, perpetuating inequality across generations (Ciaian & Kancs, 2018).

1.3.5.1.4 Social marginalization in non-Western cultures

❑ Historical and cultural marginalization

Social marginalization in non-Western cultures demonstrates how exclusion is deeply connected to history, culture, and power. One prominent example is India's caste system, where Dalits, often referred to as "untouchables," face extreme social exclusion. Despite legal protections, Dalits still encounter barriers in accessing education, employment, and other opportunities, and are frequently socially isolated (Deshpande, 2006; Varghese & Kumar, 2022). The caste system has existed for centuries, and its long-standing effects continue to shape the treatment of Dalits today. Similarly, Indigenous communities such as Aboriginal Australians have been marginalized since colonization. They lost their land, culture, and traditional way of life, and were forced to assimilate into the dominant culture, limiting their participation in social and economic life (Smye et al., 2023).

❑ Marginalization beyond economics

In other regions, such as China, Uyghur Muslims experience marginalization as their religious and cultural freedoms are heavily restricted by government policies (Sasaki & Baba, 2024). In Myanmar, ethnic minorities face discrimination and are denied democratic rights solely because of their ethnicity (Tanha et al., 2024). These examples show that social marginalization in non-Western contexts extends beyond economic exclusion, encompassing the loss of identity, culture, and social belonging. The practices of exclusion in these regions are often rooted not only in economic disadvantage but also in historical and cultural prejudices. Consequently, marginalized groups continue to encounter significant challenges that limit their access to resources and opportunities, reinforcing their social and cultural isolation (Varghese & Kumar, 2022; Ciaian & Kancs, 2018).

1.3.5.2 Economic Marginalization

❑ Impact of economic exclusion

Economic marginalization occurs when certain groups are excluded from key opportunities, such as obtaining quality jobs, accessing education, or participating fully in financial systems. This form of exclusion harms both the affected individuals and society as a whole. When people are unable to reach their full potential due to economic barriers, the economy slows down, and social problems are amplified. Communities that lack equal access to resources often remain trapped in poverty, which not only prevents economic growth but also exacerbates inequality and social frustration (Varghese & Kumar, 2022; Cician & Kancs, 2018).

❑ Cycles of inequality harm economy

The lack of opportunity not only affects those who are excluded but also the economy itself. When some people don't have access to education or good jobs, they can't fully use their skills to help the economy. This causes income inequality to grow and can lead to social problems and even economic crises. On the other hand, when wealth is shared more equally and more people have access to education and good jobs, the economy grows and benefits everyone. However, there are also systemic barriers based on things like race or gender that keep certain groups from reaching their potential, leading them to low-paying jobs that make it hard to escape poverty. These cycles of inequality continue to grow over time, keeping the rich richer and the poor stuck in a cycle of disadvantage.

❑ Gender wage gap reasons

1.3.5.2.1 Gender Wage Gap Globally

The gender wage gap occurs when women earn less than men for performing the same work. For instance, in 2023, women in the European Union earned approximately 13% less than men, with some countries, such as Estonia, showing even wider disparities (Bleich et al., 2019). A major factor contributing to this gap is the types of jobs women typically hold. Many women work in lower-paying sectors, such as teaching, retail, or caregiving, while fewer women are employed in higher-paying fields like engineering, finance, or technology (Varghese & Kumar, 2022). Social expectations and gender stereotypes also restrict women's access to certain careers. Additionally, the "motherhood penalty" plays a role, as women with children often earn less due to taking on more family responsibilities, working fewer hours, or choosing jobs with greater flexibility but lower pay (Varghese & Kumar, 2022; Smye et al., 2023).



❑ Challenges in closing wage gap

Even when women do the same work as men, they sometimes still earn less just because of their gender. Women also do more unpaid work at home, which can hold them back from advancing in their careers. The lack of affordable childcare and fewer opportunities for promotions make it even harder for women to earn the same as men. While there has been some progress, much more needs to be done to close the wage gap and make sure women are treated fairly in the workplace.

1.3.5.2.2 Refugees and Asylum Seekers

❑ Refugees face economic struggles
Refugees face economic struggles

Refugees and asylum seekers, such as Syrians in Lebanon and Rohingyas in Bangladesh, face severe economic hardships because they are often unable to work legally in host countries. Without legal work permits, they are forced into low-paying, unstable jobs in informal sectors, where they lack fair wages and job protections (Tanha et al., 2024; Ciaian & Kancs, 2018). This situation traps them in a cycle of poverty, making it difficult to improve their lives. Many refugees, particularly women and children, are employed in dangerous or exploitative work, including domestic labour or, in some cases, sex work (Tanha et al., 2024). Young refugees are especially vulnerable and frequently experience worse economic conditions than local populations. Systemic barriers, such as restrictions on legal employment, exacerbate these challenges. The COVID-19 pandemic further intensified these difficulties, highlighting the urgent need for improved support systems and policies to help refugees escape the cycle of poverty (Tanha et al., 2024).

1.3.5.2.3 Colonial Legacy in Africa

❑ Colonialism weakened Africa's economies

Colonialism had a profound impact on Africa's economies. During the colonial period, European powers controlled African territories and forced them to focus on the production of cash crops and extraction of minerals for export to the colonizers. This made African economies dependent on raw material exports rather than developing their own industries, leaving them weak and vulnerable to fluctuations in the global market (Varghese & Kumar, 2022; Ciaian & Kancs, 2018). Even today, many African countries struggle to diversify their economies and face challenges in competing with more industrialized nations.

K. R. Narayanan: From Humble Beginnings to the Presidential Throne



Did you know that K. R. Narayanan, India's first Dalit president, once had to stand outside classrooms because he couldn't afford the fees? Despite these hardships, he became a shining example of grit and determination. From interviewing Mahatma Gandhi as a young journalist to becoming the 10th President of India, Narayanan broke caste barriers and inspired millions. His journey from a small Kerala village to Rashtrapati Bhavan is a testament to the power of education and perseverance. Truly, he was a lamp that shone brightly against the darkness of social inequality!

❑ Colonialism caused inequality and uneven development in Africa

Colonialism also created major inequalities within Africa. Colonizers only invested in certain areas that had valuable resources, like minerals or cash crops, while ignoring other regions. This led to uneven development, where some parts of Africa became more developed, while others were left behind. Additionally, the environment was harmed, and local communities faced difficulties because of the way resources were taken. These colonial policies have caused lasting problems, making it hard for African countries to build industries, improve technology, and create strong infrastructure. As a result, many African nations continue to face economic struggles and inequality.

1.3.5.3 Political Marginalization

❑ Exclusion from politics

Political marginalization occurs when certain groups, such as women, immigrants, people with disabilities, or ethnic minorities, are excluded from participating in decisions that affect their lives. These groups may be unable to vote, run for office, or have their voices heard in political processes due to discriminatory rules, attitudes, or systems designed to keep them out (Varghese & Kumar, 2022; Ciaian & Kancs, 2018). Consequently, their needs and concerns are often ignored or overlooked. Political exclusion is further intensified by social factors such as race,

gender, and income, as individuals with fewer resources may feel powerless or find it difficult to access the political system, leaving them further marginalized (Deshpande, 2006; Varghese & Kumar, 2022).

❑ Socio-economic barriers to politics

Socio-economic factors, including access to education, employment, and financial resources, play a significant role in political marginalization. People who lack these resources may not have the skills or knowledge to engage effectively in political processes or the financial means to participate fully (Varghese & Kumar, 2022; Bleich et al., 2019). Discrimination based on race, gender, or social class further impedes the political representation of marginalized groups. Together, these factors create a cycle of exclusion, where underrepresented communities are consistently left out of political discussions, resulting in policies that may perpetuate their disadvantage (Varghese & Kumar, 2022; Ciaian & Kancs, 2018).

❑ Inclusive political participation

Political parties play a vital role in addressing political marginalization by ensuring that everyone, regardless of background, has the opportunity to participate in politics. They can develop inclusive policies that increase representation for women, minorities, and young people, and ensure that diverse candidates are provided with a platform. Political parties can also advocate for issues that directly affect underrepresented groups, such as gender equality, racial justice, or minority rights (Varghese & Kumar, 2022). By promoting inclusion, political parties help strengthen democracy. Breaking the cycle of exclusion requires removing barriers to participation, reforming unfair laws, and encouraging all citizens to engage in the political process so that every voice is heard and valued (Deshpande, 2006; Varghese & Kumar, 2022).

Marginalization is a serious issue that affects many groups, such as women, minorities, and refugees, by keeping them out of important opportunities and resources. It is caused by unfair systems, discrimination, and historical factors that have created deep divisions in society. To address this, we must work towards equal access for all, ensure everyone is represented in decision-making, and challenge the unfair practices that hold people back. By understanding and supporting each other, we can create a fairer world where everyone has the chance to thrive and belong.

Summarised Overview

Marginalization occurs when certain groups of people are unfairly pushed to the edges of society, making it harder for them to fully participate in important aspects of life due to factors like their race, caste, gender, economic status, or cultural background. This exclusion means they are often denied access to basic needs such as quality education, healthcare, job opportunities, and the power to influence decisions, which results in poverty, social isolation, and a sense of being invisible. For example, in India, Dalits face discrimination because of the caste system, while in the U.S., racial minorities often face barriers in housing, education, and employment. Marginalized groups also experience economic hardship, such as the gender wage gap or the exploitation of refugees who are forced into poorly paid jobs. In many cases, they lack representation in government and other decision-making processes, preventing them from having a say in the laws and policies that affect their lives. The causes of marginalization are deep-rooted in discrimination, historical injustices like colonization, and power imbalances that continue to affect certain groups. The effects of being marginalized include loneliness, long-lasting poverty, emotional distress, and hindered progress for society as a whole. To address marginalization, it is crucial to implement inclusive policies, ensure fair distribution of resources, and amplify the voices of marginalized groups, giving them a real role in shaping decisions that impact their futures.

Self-Assessment Questions

1. What is the difference between exclusion and marginalization?
2. How does marginalization affect individuals' access to resources and opportunities?
3. Why is intersectionality important in understanding marginalization?
4. What role do power structures play in sustaining marginalization?
5. Can you identify examples of social marginalization in your community?
6. How does economic inequality contribute to marginalization?
7. What are the long-term effects of marginalization on society?
8. How do political systems either perpetuate or reduce marginalization?
9. What challenges do marginalized groups face in accessing education?
10. How can cultural awareness help in reducing social marginalization?



Assignments

1. Define marginalization and explain its key characteristics. How does it manifest in different social contexts?
2. Trace the historical origins of marginalization and discuss how it has evolved over time. What are the factors contributing to its persistence?
3. Compare social marginalization in rural and urban areas. How do the causes and effects differ between these settings?
4. Analyze the impact of colonial legacies on economic marginalization in Africa. How have historical events shaped current economic inequalities?
5. Explain the role of cultural norms in perpetuating social exclusion. Can you provide examples from different societies?
6. Discuss the concept of intersectionality in relation to marginalization, with specific examples from global contexts. How do race, gender, and class interact in shaping experiences of marginalization?
7. Examine the role of education systems in either perpetuating or mitigating marginalization. How can education contribute to social inclusion or exclusion?

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Suggested Reading

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU

UNIT 3

Constitutional and Institutional Mechanism

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ explain how the Indian Constitution addresses social exclusion and discrimination.
- ▶ comprehend how fundamental rights promote social justice.
- ▶ discuss the role of main legal instruments in safeguarding marginalized groups.
- ▶ evaluate the effectiveness of welfare programs and affirmative action policies in promoting inclusion.

Background

Envisage a grand feast where every individual in the community is invited, but only a select few are given a seat at the table. While others stand outside, peering in, they feel disconnected and ignored, as if they are not even part of the celebration. A situation where certain groups, because of their social, economic, or political status, are left out of the benefits and opportunities enjoyed by the rest of society. It's as if they are invisible in the grand narrative of progress, despite being a part of the same society.

Social exclusion isn't just about a lack of physical space at the table; it's about the barriers that prevent people from fully participating in society. These barriers are not always visible, like the walls of a room, but are deeply embedded in the structures of our institutions and laws, shaping who gets to succeed, who gets to speak, and who is heard. For instance, think of how marginalized groups, like Dalits, Adivasis, or certain religious minorities, often face barriers when it comes to accessing education, healthcare, or job opportunities. It's as though the feast is set, but the invitation never arrives for them.

The Constitution of India and its institutional mechanisms are like the blueprint for an inclusive society. The Constitution promises equality, justice, and dignity for all, but the journey from this promise to reality is complicated. In the same way that a house requires not only a well-drawn plan but also skilled labour to build, these constitutional



promises need proper institutional frameworks and mechanisms to ensure they are realized for everyone, especially those at the margins. Mechanisms like reservations in education and employment, affirmative action, and various welfare policies aim to bridge these gaps, offering a chance for those excluded to come closer to the table.

Keywords

Constitutional Framework, Social Exclusion, Fundamental Rights, Right to Equality, Marginalized Communities, Affirmative Action, Social Inclusion.

Discussion

Social exclusion is a major challenge in democratic societies because it prevents certain groups from fully participating in crucial activities like voting, working, and decision-making. When some groups are left out, they don't have the same opportunities to succeed, which creates a cycle of limited access to education, healthcare, and jobs. Over time, this deepens inequality and weakens the core value of fairness that democracy should stand for.

Dr. B.R. Ambedkar, a champion of equality, faced this injustice as a Dalit and used the Indian Constitution as a tool to fight against it. He understood that simply declaring equality wasn't enough to undo centuries of discrimination. Through his efforts, the Constitution introduced laws to protect people from unfair treatment based on caste, religion, or gender. Articles 15 and 17 made discrimination illegal and abolished untouchability, while Article 46 promoted education and job opportunities for Dalits. Ambedkar's work transformed the Constitution into a promise of fairness, justice, and equal opportunity for all.

Addressing social exclusion is key to creating a society where everyone, regardless of background, can contribute to the economy, politics, and decision-making. Inclusive policies and actions are essential to ensure that all groups have the same opportunities to thrive. By offering social programs and policies that guarantee basic needs, societies can become fairer, more stable, and truly representative of all people.

1.3.1 Indian Constitution

- Indian Constitution's creation and significance

The Indian Constitution was created after a long struggle for independence and represents the country's journey towards democracy. The process began during British rule, with various laws like the Regulating Act of 1773 and the Government of India Act of 1935, which laid the foundation for India's governance. During the independence movement, leaders such as Mahatma Gandhi, Jawaharlal Nehru, and B.R. Ambedkar pushed for self-governance and helped draft the Constitution. The Constituent Assembly, made up of representatives from diverse backgrounds, worked on this task, and on November 26, 1949, the Constitution was adopted. It came into effect on January 26, 1950, replacing British laws and establishing India as a sovereign democratic republic.

Are Civilian Awards Against the Law?

Did You Know? There was a time when India's top civilian awards like the Bharat Ratna and Padma awards were questioned for possibly violating Article 18 of the Constitution, which bans titles! The Supreme Court even paused the awards for a while. But later, it ruled that these awards are about honouring achievements, not granting titles, so they don't break any rules. Cool, right?

- Ongoing challenge of social exclusion despite constitutional provisions

The Indian Constitution was created to ensure equality and justice for all citizens, but social exclusion remains a significant challenge. While the Constitution includes provisions to fight discrimination, especially against marginalized groups like Dalits, women, and minorities, the problem is far from solved. Major articles in the Constitution, like Article 17, which abolishes untouchability, and Articles 14, 15, and 16, which promote equality, have made important strides. However, social exclusion goes beyond caste and includes issues like poverty, gender, and religion, which are harder to address. The legal framework still faces difficulties in changing deeply rooted societal inequalities, making the full promise of equality a work in progress.



1.3.2 Constitutional Provisions Against Social Exclusion

- ❑ Constitutional provisions for combating social exclusion

The Indian Constitution provides several provisions to combat social exclusion and promote equality among its citizens. These provisions are rooted in the Fundamental Rights, Directive Principles of State Policy, and Reservation Policies, each designed to protect marginalized groups and ensure a fair and just society. Fundamental Rights guarantee basic freedoms and equal treatment for all, preventing discrimination based on caste, religion, or gender. The Directive Principles of State Policy guide the government in creating policies that promote social and economic justice for the disadvantaged. Reservation Policies offer affirmative action to support underrepresented groups in education, employment, and political representation. Together, these constitutional provisions aim to reduce social exclusion and create a more inclusive India.

Savitribai Phule

Champion of Education and Equality



Savitribai Phule's fight against social exclusion was truly inspiring. At a time when girls and marginalized communities weren't allowed to go to school, she opened the first school for girls in Pune. She made sure that even Dalits and people from lower castes, who were often left out, could learn there. Despite being attacked with stones and mud, she never gave up. In fact, she would carry an extra sari to change into after the attacks, showing her strength and determination. She even started offering scholarships to help encourage education and opened 18 schools across India. Through her work, she changed the way society saw education, making it a powerful tool for those who had been ignored for so long. Truly, she was a lamp that shone brightly against the darkness of social inequality!

1.3.2.1 Fundamental Rights

Fundamental Rights are essential rights guaranteed to all citizens by the Indian Constitution, ensuring that every individual enjoys basic freedoms and protections. These rights, outlined in Part III of the Constitution, include six main areas: the Right to Equality (Articles 14-18), which ensures equal treatment for all citizens; the Right to Freedom (Articles 19-22), which guarantees civil liberties; the Right against Exploitation (Articles 23-24), protecting individuals from forced labour and trafficking; the Right to Freedom of Religion (Articles 25-28), ensuring religious freedom; Cultural and Educational Rights (Articles 29-30), allowing minorities to preserve their culture and establish educational institutions; and the Right to Constitutional Remedies (Articles 32-35), which empowers citizens to seek justice in courts. While these rights are fundamental and enforceable, they are not absolute and can be limited under certain conditions. These provisions form the backbone of a just and democratic society, safeguarding individual freedoms and promoting equality.

❑ Significance of fundamental rights

a. Right to Equality (Article 14)

Article 14 of the Indian Constitution ensures that everyone is treated equally by the law, whether they are citizens or foreigners. It means no one can be treated unfairly because of their religion, race, caste, gender, or birthplace. The article has two main ideas: first, that no one should face discrimination under the law, and second, that the government can give extra help to those who have been treated unfairly in the past, like Scheduled Castes or Tribes, through special support or policies (called "affirmative action"). The goal of Article 14 is not just to treat everyone the same, but to help eliminate deep-rooted problems like poverty or discrimination, so that everyone has the same opportunities and no one is left behind. This helps create a fair and just society where liberty and equality work together.

❑ Article 14 ensures equality and affirmative action

b. Prohibition of Discrimination (Article 15)

Article 15 of the Indian Constitution ensures that no one can be treated unfairly because of their religion, race, caste, sex, or place of birth. It guarantees that everyone has the right to use public spaces like shops, restaurants, wells, and roads without discrimination. The article also allows the government

❑ Article 15 promotes non-discrimination and affirmative support



to provide extra support to groups who have been treated unfairly in the past, such as women, children, and people from backward classes like Scheduled Castes and Scheduled Tribes. This helps improve their social and educational status. The main goal of Article 15 is to prevent discrimination and reduce social exclusion, making sure everyone has the same rights and opportunities, especially those who have been marginalized in the past.

c. Equality of Opportunity (Article 16)

☐ equal opportunity in government jobs with reservations

Article 16 of the Indian Constitution guarantees equality of opportunity in public employment, meaning all citizens can apply for government jobs without discrimination based on religion, race, caste, sex, place of birth, or residence. It applies to jobs in both the Central and State governments and allows for reservations for Scheduled Castes (SC), Scheduled Tribes (ST), and Other Backward Classes (OBC) to help historically disadvantaged groups access government jobs. The total reservations cannot exceed 50%, ensuring that merit remains important. A key update was the 103rd Amendment in 2019, which introduced a 10% reservation for Economically Weaker Sections (EWS). This article promotes substantive equality, meaning that equal treatment alone may not be enough for fairness, and the use of affirmative actions like reservations aims to create a more level playing field for marginalized groups, helping them compete for government jobs and fostering social justice.

India Pioneers Social Justice Through Positive Discrimination!

Did You Know? India's system of positive discrimination, or affirmative action, is one of the most extensive in the world! Through policies like reservations in education, jobs, and legislatures for Scheduled Castes, Scheduled Tribes, and Other Backward Classes, India addresses centuries of inequality and promotes social inclusion. These measures aim to ensure fair opportunities for marginalized communities and uphold the principles of justice and equality enshrined in the Constitution.

1.3.2.2 Directive Principles of State Policy

The Directive Principles of State Policy (DPSPs) in the Indian Constitution are guidelines that help the government create laws for the well-being of the people, focusing on fairness, equality, and social justice. Although these principles are not enforceable by law, meaning people can't go to court if the government doesn't follow them, they are still important for addressing issues like poverty, inequality, education, and protecting the rights of marginalized groups. The DPSPs cover areas like economic fairness, social justice, and international peace, guiding the government in making decisions about things like equal rights and workers' protections. Unlike Fundamental Rights, which are basic freedoms that can be enforced by the courts, the DPSPs guide the government in creating laws to improve society but cannot be directly enforced. Together, both principles work to make India a fairer and more just place for everyone.

❑ DPSPs guide government policies for social justice and equality

1.3.2.2.1 Promotion of welfare for marginalized groups (Article 46)

Article 46 of the Indian Constitution directs the government to protect and uplift weaker sections of society, including Scheduled Castes (SCs), Scheduled Tribes (STs), and other marginalized communities, by improving their education and economic conditions. The government provides support through scholarships, reservations in schools and government jobs, special business programs, financial aid, and measures to protect their land rights. Important court cases, such as the Indira Sawhney case, have set limits on reservations to ensure fairness. Article 46 reflects India's commitment to creating a more just and equal society by helping those who have faced historical discrimination and giving them the opportunity to succeed in education, employment, and social life.

❑ Article 46 promotes upliftment of marginalized communities

1.3.2.3 Reservation Policies

In India, the reservation system helps ensure that groups who have been treated unfairly in the past, such as Scheduled Castes (SC), Scheduled Tribes (ST), Other Backward Classes (OBC), Economically Weaker Sections (EWS), and people with disabilities, have special opportunities in education and government jobs. This system, which sets aside a certain per-

❑ Reservation system for social justice and its controversy



centage of seats for these groups, aims to correct social inequalities and provide everyone a fair chance to succeed. It is part of the Indian Constitution, designed to promote fairness and social justice. However, the reservation policy is controversial—while some believe it helps uplift marginalized communities, others argue that it may lead to unfair advantages and create divisions between different groups. Despite its goals, the system continues to spark debate about its effectiveness and fairness in modern society.

a. Quotas for Scheduled Castes (SCs)

The Supreme Court recently made an important decision about quotas for Scheduled Castes (SCs) in India. Currently, SCs get a 15% reservation in education and jobs. According to the 2011 Census, about 16.6% of India's population belongs to the SC category. The Court's new ruling allows states to divide this 15% reservation into smaller groups within the SC category to ensure that those who are more disadvantaged get better opportunities. States can now create these sub-categories, but they must use clear data to show that the need for this division is real. This is because SCs are not all the same and have different levels of development.

❑ Supreme Court ruling on sub-categories within SC reservation

The Supreme Court recognized that some SC groups have been left behind, so the government has set up a committee to make sure the benefits of these quotas reach the most needy people. This ruling changes an earlier decision from 2004 and is designed to help those SC groups who have been the most marginalized. By doing this, the Court aims to make sure that the support given through quotas is shared more fairly among all SC groups.

❑ Supreme Court's decision to ensure fair distribution of SC quotas

b. Scheduled Tribes (STs)

In India, Scheduled Tribes (STs) are given special reservations in jobs and education to ensure they have equal opportunities, as they have faced historical hardships and lack access to the same resources as other groups. At the national level, 7.5% of seats in government jobs and educational institutions are reserved for STs, though this percentage can be higher in some states like Arunachal Pradesh, where it can be as much as 45%. The total reservation for all backward groups, including Scheduled Castes (SCs) and Other Backward Classes (OBCs), is capped at 50%. The reason for this reservation system is to

❑ Reservation for STs to ensure equal opportunities and overcome hardships

help STs overcome the challenges they face, such as living in remote areas with limited access to education, healthcare, and other resources

❑ Sub-quotas for most disadvantaged ST groups with data-based support

Over time, the system has been adjusted to make sure that the most disadvantaged tribal groups get the most support. The Supreme Court recently allowed states to create sub-quotas within the ST reservation, so the most backward tribal groups can receive more benefits. However, this change does not increase the overall reservation limit of 50%, and the sub-quotas must be based on solid data to make sure they are fair and truly help those in need.

c. Other Backward Classes (OBCs).

The Other Backward Classes (OBCs) in India are communities that are considered socially and educationally disadvantaged, and the government helps improve their opportunities by offering special provisions like reservations in education and government jobs. This system began in 1990, reserving 27% of seats in central government institutions and services for OBCs. However, wealthier and more educated members of these communities, known as the "creamy layer," are not eligible for these benefits. Each state has its own reservation system, with some like Tamil Nadu offering 69% reservations, while others like Arunachal Pradesh provide none. The system uses two lists: the Central OBC List for national government jobs and institutions, and the State OBC Lists for state-run institutions. These lists are updated regularly, supported by a caste census that helps identify communities in need. While this census is important for making the system fairer, it faces challenges like resistance from some groups and concerns about how the data will be used. Despite these issues, the reservation system is a key tool in ensuring equal opportunities for OBC communities and continues to evolve with legal, political, and social factors.

❑ OBC reservations and the evolving system for equal opportunities

1.3.3 Major Legislations Addressing Social Exclusion

In India, several laws address social exclusion and promote equality. The Constitution guarantees rights against untouchability and discrimination. The Prevention of Atrocities Act protects Dalits and Adivasis from violence. The Right to Education Act ensures free education for all children, and the National Commission for Minorities Act safeguards the rights



of religious minorities. These laws aim to reduce exclusion and promote equality for marginalized groups.

1. Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act.

❑ SC/ST (Prevention of Atrocities) Act for protecting marginalized communities

The Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act, 1989, was made to protect people from the SC/ST communities from violence and unfair treatment. It aims to stop hate crimes by creating special courts for these cases and offering support to victims. The law lists 37 types of violence and discrimination, like forcing someone to do humiliating jobs or stopping them from voting. It focuses on protecting the dignity and respect of SC/ST people, something that earlier laws didn't fully cover. Over time, the law has been made stronger with changes, including adding more crimes to the list and speeding up investigations. In 2018, changes were made so that people accused of these crimes can't avoid punishment by getting bail before their trial. The law also made sure that cases are handled faster, with a 60-day deadline for investigations, making it more effective in bringing justice to SC/ST communities.

2. Equal Remuneration Act

❑ Equal pay law for gender equality in India

The Equal Remuneration Act, 1976, is a law in India that ensures men and women receive equal pay for the same or similar work, preventing employers from paying workers differently based on gender. It also ensures fair treatment during hiring. Employers who don't follow the law can face fines or jail time. This law applies to both government and private workplaces, with different authorities overseeing jobs at central and state levels. While it has helped reduce the gender pay gap, challenges remain, especially in unorganized sectors, and the pay gap grew after the COVID-19 pandemic. In 2019, the Code on Wages replaced this Act, offering better protection and broader coverage, including beyond binary genders. The Indian Supreme Court has been vital in enforcing this law, ruling that equal pay for equal work is a constitutional goal, even for temporary or daily wage workers. The Court's decisions ensure that workers are treated fairly and receive the pay they deserve, regardless of gender.

3. Protection of Civil Rights Act

The Protection of Civil Rights (PCR) Act of 1955 was created to end untouchability, which is discrimination against people based on their caste. The Act makes it illegal to stop someone from entering public places, using services, or getting an education because of their caste. It also punishes those who force people into degrading jobs or harm them because of their caste. The law applies across India and anyone found guilty can face imprisonment and fines. The National Commission for Scheduled Castes (NCSC) monitors and investigates violations of this law to protect the rights of marginalized communities. However, a challenge is that discrimination still happens, and punishments sometimes aren't enough to prevent it. Despite these challenges, the law is an important step in ensuring equal rights for everyone.

- ❑ Law against untouchability and caste discrimination in India

1.3.4 Institutional Mechanisms

Institutional mechanisms in India are structures and systems set up to address social exclusion and promote equality. These include government bodies, laws, and policies designed to protect marginalized groups, such as Scheduled Castes, Scheduled Tribes, and women, from discrimination. For example, the government has created various commissions like the National Commission for Scheduled Castes and the National Commission for Women to ensure these groups have access to their rights and opportunities. Laws like the Prevention of Atrocities Act and policies like reservation in education and jobs are meant to reduce social exclusion and help create a more inclusive society. These mechanisms work together to ensure that everyone has an equal chance to thrive.

- ❑ Mechanisms for promoting equality and addressing social exclusion in India

1.3.4.1 National Commissions

National Commissions in India are bodies set up to protect and promote the rights of various social groups, ensuring that they are not excluded or discriminated against. These commissions focus on issues like caste, gender, disabilities, and the welfare of children. For example, the National Commission for Scheduled Castes works to protect the rights of Dalits, while the National Commission for Women focuses on improving the status of women in India. Other commissions, like the National

- ❑ National Commissions protecting rights of marginalized groups in India)



Commission for Minorities and the National Commission for Protection of Child Rights, aim to safeguard the interests of minority communities and children. These bodies monitor government policies, suggest changes, and ensure that the rights of vulnerable groups are upheld.

1.3.4.1.1 National Commission for Scheduled Castes (NCSC)

❑ National Commission for Scheduled Castes protects SC rights and welfare

The National Commission for Scheduled Castes (NCSC) is a constitutional body in India that ensures the rights and welfare of Scheduled Castes (SCs). It was established under the Ministry of Social Justice and Empowerment on February 19, 2004, and works to protect SCs from discrimination and inequality. Its main role is to monitor legal and constitutional safeguards, investigate complaints about rights violations, and recommend policies to improve the socio-economic status of SCs. With its headquarters in New Delhi, the NCSC operates as a guardian of equality for disadvantaged communities.

The Struggles of Denotified Tribes in India

Denotified Tribes (DNTs) in India have had a tough time because of an unfair label given to them during British rule, calling them "criminal tribes." Even though this label was officially removed in 1952, they still face a lot of discrimination today. Many DNTs can't get proper documents, which means they miss out on government help. Only a small number are able to access support, and they often work in low-paying jobs with little chance to improve their lives. Some even change their names to avoid being treated badly. These challenges make it hard for DNTs to get ahead, and they continue to be left out of many opportunities in society.

❑ NCSC investigates SC rights violations

One of the key responsibilities of the NCSC is to investigate whether the rules meant to protect SCs are being followed. It can handle complaints when SCs face discrimination or when their rights are denied. The NCSC also evaluates how effective government programs are in uplifting SCs and advises the government on improving policies. It presents annual reports

to the President of India, suggesting new measures to enhance the development and welfare of SCs. To carry out its duties, the NCSC has the authority of a civil court, meaning it can summon witnesses, review documents, and hold inquiries.

- ❑ NCSC faces challenges like limited power, resource shortages, and delays

However, the NCSC faces several challenges. Its recommendations are only advisory, which means the government is not required to follow them, limiting its power to bring real change. It also struggles with delays in presenting its findings, lacks resources like enough staff and funds, and sometimes overlooks the most marginalized sub-groups within SCs. These challenges weaken its ability to fully protect the interests of SCs.

Despite these limitations, the NCSC plays a vital role in advocating for equality and justice for Scheduled Castes. It evaluates the effectiveness of laws and welfare schemes, ensuring that the voices of SCs are heard. By continuously working to improve its methods and influence, the NCSC contributes to creating a more inclusive and fair society.

1.3.4.1.2 National Commission for Scheduled Tribes (NCST)

- ❑ NCST protects tribal rights and addresses their issues

The National Commission for Scheduled Tribes (NCST) was created by the Indian government in 2004 to protect and help tribal communities by making sure they get the rights promised to them in the Constitution. The NCST has five members, including a Chairperson, Vice-Chairperson, and at least one woman, all chosen by the President. Their main job is to ensure that tribal people have access to education, jobs, and basic rights. They investigate complaints of unfair treatment, advise the government on improving conditions for tribal communities, and have powers like a court to gather information. The NCST also makes sure the government consults them before making important decisions that affect tribal people. If tribal people face issues, they can send complaints to the NCST, which works to solve them and keep the complainant updated.

1.3.4.2 Social Justice and Empowerment Ministry

- ❑ Ministry supports marginalized groups in India

The Ministry of Social Justice and Empowerment is an important part of the Indian government that works to support people who face challenges in society. It focuses on helping groups like Scheduled Castes, Other Backward Classes, transgender people, people with disabilities, senior citizens, and



those struggling with drug abuse. These groups often need extra help to live better lives, and the ministry provides them with opportunities and resources to improve their situations.

❑ Ministry helps marginalized groups with key programs and funding

The ministry was first created in 1985-86 as the Ministry of Welfare and was renamed in 1998. Today, it is led by Dr. Virendra Kumar, and it works with a budget of ₹6,908 crore (as of 2017-18). The ministry has helped improve the lives of many people by creating programs like the Transgender Persons (Protection of Rights) Act in 2019 and setting up the National Council for Transgender Persons in 2020. It also supports programs like the SMILE Scheme to help transgender people and those engaged in begging by offering them rehabilitation and livelihood opportunities.

❑ Ministry focuses on social inclusion and substance abuse prevention

In addition to economic empowerment, the ministry also works on social inclusion and the fight against substance abuse. It runs programs like the Pradhan Mantri Anusuchit Jaati Abhyuday Yojana (PM-AJAY) to help Scheduled Castes find jobs and improve their social and economic conditions. The ministry also works to raise awareness about drug abuse through the Nasha Mukta Bharat Abhiyaan (NMBA) and provides counseling and treatment in schools and colleges. For people with disabilities, the Unique Disability ID (UDID) program helps by giving them identity cards and creating a database to offer better support.

Child Marriage — A Barrier to Education and Opportunity

Every year, over 12 million girls are married before the age of 18, which limits their chances to go to school and grow personally. This practice excludes them from opportunities to learn, pursue careers, and live fulfilling lives. For example, in Niger, 76% of girls are married before they turn 18, one of the highest rates in the world. Child marriage not only disrupts childhood but also deepens cycles of poverty and inequality, making it harder for these girls to break free and thrive.

❑ Ministry promotes skill development and support for senior citizens

The ministry also supports skill development. Programs like PM-DAKSH Yojana train marginalized people, including Scheduled Castes, sanitation workers, and transgender individuals, to help them find jobs and improve their income. For senior citizens, the ministry has set up Elderline, a national helpline that provides assistance across 31 states and Union Territories.

By addressing issues like poverty, discrimination, and lack of opportunities, the Ministry of Social Justice and Empowerment plays a crucial role in creating an inclusive and fair society. Its programs and initiatives ensure that marginalized communities can lead dignified lives and contribute to India's development.

1.3.4.3 National Human Rights Commission

The National Human Rights Commission (NHRC) was created in 1993 to protect basic human rights in India, such as the right to live safely and with dignity. It is led by a Chairperson, usually a former Chief Justice of India, and includes five members, including at least one woman. The NHRC investigates complaints about human rights violations, looks into conditions in prisons, and raises awareness about human rights. Although the NHRC can ask for reports from government agencies and make recommendations, its decisions are not legally enforceable. Over the years, it has investigated serious cases like child trafficking and the mistreatment of marginalized communities, but it faces challenges like limited resources and staff. The NHRC cannot punish those who ignore its recommendations or take action against private individuals and the armed forces. Despite these limitations, the NHRC works with NGOs to improve the lives of vulnerable groups, and experts suggest it should have more power, money, and authority to be more effective.

❑ NHRC protects human rights but faces challenges in enforcement and resources

1.3.4.4 Women's Commission

The National Commission for Women (NCW) is a government organization in India, established in 1992, with the goal of protecting and promoting women's rights. It addresses critical issues like dowry, domestic violence, and unequal job opportunities. The NCW investigates cases of women's rights violations, provides free legal advice, and helps women who face violence or harassment. It also runs awareness campaigns to educate women about their rights and offers a helpline to support those in need. The commission works with various organizations and NGOs to spread awareness and empower women to stand up for themselves. Over the years, the NCW has played a key role in improving laws, such as the Domestic Violence Act and Dowry Prohibition Act, and ensuring they are properly implemented. Through special programs like the NRI Cell, it helps resolve issues such as marriage disputes across

❑ Protection of women rights



countries. By offering legal and emotional support, conducting awareness programs, and influencing policies, the NCW strives to create a more just and equal society for women.

1.3.5 Judiciary's Role on Tackling Social Exclusion

The judiciary helps fight social exclusion in India by ensuring that laws protecting marginalized groups are followed. Courts address discrimination and uphold the rights of disadvantaged communities. They also make sure policies like reservations are applied fairly, promoting equality and social justice.

1. Landmark judgments addressing social exclusion.

The Supreme Court of India has made crucial decisions to help combat social exclusion, particularly for marginalized groups like women and those from lower castes. One significant case was *Bandhua Mukti Morcha v. Union of India*, which demonstrated how Public Interest Litigation (PIL) can support people who are unable to approach the court due to poverty or social exclusion. The Court ruled that anyone could seek legal assistance for those unable to fight for their rights themselves. This judgment played a vital role in protecting the rights of the disadvantaged and ensuring they are not left behind in seeking justice.

☐ Supreme Court and social justice

Another important case, *Vishaka v. State of Rajasthan*, addressed gender-based social exclusion, focusing on workplace sexual harassment. The case stemmed from the tragic attack on Bhanwari Devi, a social worker, who was assaulted for trying to stop a child marriage. The Supreme Court set out critical guidelines for preventing sexual harassment at work, which were later implemented by the government to protect women from workplace abuse. This ruling marked a significant step in addressing gender inequality and ensuring safer environments for women across the country.

☐ Supreme Court and gender equality

In *Indra Sawhney v. Union of India*, the Supreme Court addressed social justice by setting guidelines for reservations for backward classes. The Court capped reservations at 50% and ruled that wealthier members of a community, known as the "creamy layer," should not benefit from these reservations, ensuring that the most disadvantaged members receive the necessary support. The Court's ruling aimed to promote fairness and equality by ensuring that opportunities are given to those who need them the most. Similarly, in *Sukanya Shantha v. Union of*

☐ Supreme Court and social justice rulings

India, the Court fought against caste-based discrimination in prisons, mandating that caste segregation be removed, thus ensuring that all prisoners are treated equally, regardless of caste.

❑ Supreme Court's role in social justice and equity

In the Sub-Classification of Scheduled Castes Case (2024), the Court ruled that Scheduled Castes (SCs) should be treated as separate sub-groups to ensure that the most disadvantaged among them receive more targeted support. This decision recognized the varying levels of disadvantage within SC communities, requiring specific policies for different needs. The DP Joshi v. State of Madhya Bharat case also upheld reservations for backward classes, emphasizing that these should be based on objective criteria, not just caste alone, to ensure fairness. Through these landmark judgments, the Supreme Court has played an essential role in addressing social exclusion, promoting social justice, and ensuring that marginalized groups, regardless of gender, caste, or social status, have equal access to justice and opportunities.

2. Judicial activism and the protection of marginalized groups.

❑ Judicial activism and protecting marginalized groups

Judicial activism is when judges take a more active role in protecting people's rights, especially those from marginalized groups. It allows judges to go beyond strict legal rules and look at the bigger picture, considering how their decisions affect society as a whole. This approach helps ensure that everyone, including vulnerable groups, gets fair treatment under the law. Judges can identify new ways to protect people, make sure laws are interpreted in a way that prevents discrimination, and create opportunities for marginalized groups to seek justice.

In India, judges like V.R. Krishna Iyer and P.N. Bhagwati have played important roles in using judicial activism to defend the rights of minorities and disadvantaged groups. These judges have made decisions that improve the lives of people who might otherwise be ignored, such as ensuring workplace rights for women or promoting sustainable development. Judicial activism has been a powerful tool for addressing social issues and making sure the voices of marginalized groups are heard.

The Indian Constitution gives the courts special powers to protect people's rights. Articles 32 and 226 allow higher courts to cancel laws or actions by the government if they go against the Constitution. This system ensures that marginalized groups have a way to challenge unfair practices and ask for justice.



Judicial activism is an essential part of this process, as it helps make sure that everyone, no matter their background, can have access to their rights and equality.

1.3.6 Policy Framework and Implementation

❑ Challenges in policy implementation for social inclusion

The policy framework in India aims to reduce social exclusion by creating laws and programs that support marginalized groups, such as scheduled castes, tribes, and women. However, implementing these policies effectively can be challenging due to issues like lack of awareness, inadequate resources, and resistance to change. For these policies to succeed, they need proper enforcement and support at all levels of government.

1.3.6.1 Affirmative action and welfare programs.

❑ Affirmative action for marginalized groups

India's affirmative action policies are designed to help groups of people who have faced historical disadvantages. These policies, deeply rooted in India's Constitution, target groups like Scheduled Castes (SC), Scheduled Tribes (ST), Other Backward Classes (OBC), and Economically Weaker Sections (EWS). They aim to level the playing field by offering benefits like reserved seats in government jobs, educational institutions, and legislative bodies. The policies also provide scholarships and financial support, along with legal protections against discrimination. The goal is to create a more equal society by addressing the inequalities based on caste and ethnicity.

These affirmative action policies affect a large part of India's population, roughly two-thirds of it. The Constitution has set a limit on how many seats can be reserved, with a 50% cap on reservations. The system was designed to ensure that marginalized communities have opportunities that were historically denied to them. For example, in 2014, 94% of academic scholarships were awarded to people from SC, ST, and OBC groups. The aim is to give these communities a better chance for education and jobs, and to help them achieve social justice.

However, implementing affirmative action in India comes with challenges. One problem is the "creamy layer" issue, where wealthier individuals from reserved categories continue to benefit from the system, leaving behind those who are more disadvantaged. Another challenge is that only a small percentage of OBC castes receive the benefits, while many others remain unrepresented. There is also a lack of clear categorization at the national level, and persistent social stigma makes it harder for marginalized groups to fully benefit from these policies. These

❑ Challenges in affirmative action implementation

problems mean that the benefits of affirmative action don't always reach the people who need them the most.

Healthcare Gaps—The Struggle for Rural Communities

Did you know that in India, the number of doctors in cities is much higher than in villages? In rural areas, there's only 1 doctor for every 25,000 people, but in cities, it's 1 doctor for every 2,000 people! Even in Kerala, a state known for its good health, tribal communities in places like Palakkad find it hard to get proper healthcare. This lack of access leads to preventable diseases and even deaths. It shows how important it is to make healthcare available to everyone, no matter where they live, so no one gets left behind.

❑ Role of state governments in affirmative action

State governments play an important role in implementing affirmative action by creating reservation laws specific to their regions. They can design policies for state-level jobs, educational institutions, and local government positions. States are also responsible for maintaining lists of backward classes and creating targeted welfare programs. They work with national bodies to make sure that affirmative action policies are applied fairly. This coordination helps ensure that the benefits of these policies reach the people who need them in different parts of the country.

❑ Challenges due to unclear implementation guidelines

One challenge with affirmative action in India is the lack of clear, systematic guidelines for how these policies should be implemented. Without clear rules, the policies are sometimes applied in inconsistent ways, leading to legal challenges. Courts have to step in and provide guidelines, as seen in the landmark *Indra Sawhney vs. Union of India* case in 1992. These ongoing legal and political debates about the fairness and effectiveness of affirmative action often slow down progress and create confusion about how best to apply the policies. As a result, the goals of affirmative action are sometimes hindered by the lack of clear rules and guidelines for implementation.

1.3.6.2 Education, health, and employment schemes for disadvantaged groups.

The Indian government has launched several programs to support disadvantaged groups, focusing on education, em-



❑ Programmes supporting education for disadvantaged groups

❑ Government programs for employment and skill development

❑ Challenges in addressing social exclusion in India

❑ Challenges in public policy implementation in India

ployment, and skill development. For education, there are initiatives like the Pradhan Mantri Uchchatar Shiksha Abhiyan (PM-USHA), which focuses on underserved areas with a large budget for development, and Samagra Shiksha, which ensures inclusive education from preschool to high school. There are also scholarship schemes for minority students, offering financial support for both pre-matric and post-matric levels, and reserving 30% of the scholarships for girls. These programs aim to make education more accessible to everyone, especially those from disadvantaged backgrounds.

In terms of employment and skills, the government has introduced several key initiatives. Seekho Aur Kamao focuses on skill development for young people aged 14-35, while UST-TAD provides self-employment opportunities for traditional artisans. The Nai Manzil program helps school dropouts by combining education and skill development to help them find jobs. There are programs like Nai Roshni, which helps women from minority communities develop leadership skills, and the Gender Inclusion Fund, which promotes education for girls and transgender students. Together, these schemes work to bridge gaps in education, employment, and skills, helping disadvantaged communities improve their social and economic standing.

1.3.7. Challenges and Gaps

Despite efforts to address social exclusion, there are still many challenges and gaps in India's approach. These include insufficient implementation of policies, lack of awareness among the public, and resistance from certain groups. Social biases and discrimination still persist in many areas, making it difficult for marginalized communities to fully benefit from constitutional protections and policies. More effective enforcement and broader social change are needed to close these gaps.

1.3.7.1 Challenges in Public Policy Implementation in India

Public policy implementation in India faces several significant challenges that hinder its effectiveness. One major issue is the gap between policy planning and actual execution. Often, policies are made without considering how they will be practically carried out. The people who create these policies and those responsible for implementing them sometimes do not collaborate effectively, leading to confusion and inefficiency. As a result, policies struggle to achieve their intended goals and make a real impact.

❑ Bureaucratic issues hinder policy implementation

❑ Resource constraints limit policy effectiveness

❑ Challenges in policy implementation and suggested solutions

Bureaucratic problems, such as corruption and excessive red tape, also slow down the process. The administrative steps required to implement policies can be complicated, causing delays and difficulties in carrying them out. Moreover, a lack of clear accountability and monitoring makes it challenging to track whether policies are being followed properly. Without proper oversight, things can go unnoticed, and the policies may not reach the people who need them the most. These issues further undermine the success of policy implementation.

Resource constraints, including financial limitations, are another significant factor limiting the effectiveness of public policies. India often faces budget shortages, making it difficult to fund essential projects. As a result, tough decisions must be made, and some important areas may be neglected. In addition, political disagreements and the country's vast diversity present challenges in creating policies that are universally applicable. There is also a shortage of skilled personnel to carry out complex tasks, which further complicates matters.

Several key policies, such as the National Rural Health Mission, Mahatma Gandhi National Rural Employment Guarantee Act, Pradhan Mantri Gram Sadak Yojana, Pradhan Mantri Awas Yojana, and the Aadhaar-enabled Biometric Attendance System, have faced obstacles like corruption, delays, and poor infrastructure. These challenges have made it difficult to provide services to people effectively. To improve the situation, experts recommend using technology for better monitoring and ensuring that those responsible for implementing policies are adequately prepared and trained. By addressing these issues, India can overcome challenges in policy implementation and ensure that its citizens receive the support they need.

1.3.7.2 Issues of intersectionality (caste, gender, religion, etc.)

In India, people often face multiple layers of discrimination based on factors like caste, gender, religion, and economic status, creating complex challenges, especially for marginalized groups like Dalit women, who experience both gender and caste-based discrimination. The current legal frameworks in India often fail to address this problem because they treat different types of discrimination separately and do not fully understand how these identities overlap. For example, laws may not consider the ways caste and gender work together to affect someone's life. To better tackle these issues, experts suggest that India needs inclu-

❑ Addressing overlapping discrimination

sive policies and laws that recognize these overlapping forms of discrimination and offer stronger protections for marginalized communities. Feminist scholars like Nivedita Menon argue that because identities are complex and constantly changing, policies should be more flexible and inclusive to effectively address the diverse needs of people in India.

1.3.7.3 Corruption and inefficiency in institutional mechanisms

❑ Corruption weakens institutions and democracy

Corruption harms institutions by making them less effective and accountable, often allowing those in power, like politicians and government officials, to act wrongly without facing punishment (Awio, Lawrence, & Northcott, 2007; DiNitto & Johnson, 2016). This happens because systems that should monitor these actions are weak and there is a lack of transparency in how decisions are made (Awio, Lawrence, & Northcott, 2007). Corruption hurts democracy by reducing trust in the government, making it harder for citizens to hold leaders responsible (Laxmikanth, 2020; DiNitto & Johnson, 2016). It can lead to more unfair rule, where leaders prioritize their own power rather than the people's needs. Corruption wastes money meant for essential services like health and education, and causes problems in both public and private sectors (DiNitto & Johnson, 2016). Over time, it can even lead to economic failure or cause governments to collapse (Sowell, 2004). Fighting corruption is difficult because those involved often work together to protect their interests, so strong reforms are needed to make institutions more transparent and accountable (Awio, Lawrence, & Northcott, 2007; DiNitto & Johnson, 2016).

The Hidden Cost of Development: Displacement and Loss

In India, around 60 million people have been displaced by large development projects like dams, highways, and mines since Independence. In Kerala, the construction of the Idukki Dam caused many tribal communities to lose their homes. Unfortunately, many of these families were not given the proper support or rehabilitation they needed. This highlights a harsh reality: while development brings progress, it can also cause deep hardships for people who lose their land and way of life.

1.3.8 Global efforts to fight social exclusion

There are many international efforts to reduce social exclusion and help people who are left out of society. The United Nations has a goal to make sure everyone is included by 2030. The European Union works with its member countries to fight poverty and exclusion through different plans, like the Europe 2020 strategy, which aims to reduce poverty by 25%. The International Labour Organization (ILO) also has programs to help excluded people by providing social protection and finding new ways to include them. The World Bank looks at groups who are most at risk and makes sure their needs are considered in projects. All of these efforts work together to fight social exclusion in different ways, focusing on policies, support, and social actions.

a. United Nations Initiatives

The United Nations Sustainable Development Goal 10 (SDG 10) is about reducing inequalities and making sure that all people, no matter who they are or where they come from, have the chance to succeed. This goal focuses on giving everyone equal opportunities, regardless of age, gender, disability, race, or economic status. To make this happen, countries are encouraged to remove unfair laws, provide equal opportunities, and make sure marginalized groups, like poor people, get the support they need. Actions like collecting data on discrimination, investing in social services like healthcare and education, and offering programs like cash transfers can help break the cycle of poverty and provide better chances for those who have been left out.

❑ SDG 10 aims to reduce inequalities and provide equal opportunities for all

❑ Challenges in achieving SDG 10

However, achieving SDG 10 faces challenges. One of the biggest problems is the lack of detailed data to understand how inequality affects different groups. There are also deep-rooted issues, like the wage gap between rich and poor, and barriers such as migration and racism that make life harder for some people. Migrants and refugees struggle to get rights or support in new countries, and many still don't have access to basic services. To fully achieve SDG 10, governments need to be committed and work together to create policies that reduce inequality.



b. European Union Strategies

The European Union (EU) works together to help people in need and make sure everyone has a fair chance in life. One way they do this is through the Open Method of Coordination (OMC), which encourages countries to share ideas and learn from each other. Countries set their own plans but aim for common goals, like reducing poverty. They also use reports to track progress and improve social services. Another plan, Europe 2020, aimed to reduce poverty by 25% by 2020, and the European Pillar of Social Rights Action Plan wants to help 15 million people by 2030.

❑ EU efforts to reduce poverty and inequality

❑ EU uses benchmarks for progress

The EU tracks progress by using benchmarks, which are targets like reducing poverty or improving healthcare. These help countries compare their work and find the best ways to help people. This approach is flexible, meaning each country can adapt the goals to fit their own needs. By working together and setting clear goals, the EU ensures that everyone, no matter their situation, has the opportunity to succeed.

c. International Labour Organization (ILO) Programs

The International Labour Organization (ILO) runs a program called STEP that helps people who are often left out of society, especially those in informal jobs like farmers or street vendors. STEP focuses on creating ways for these people to access important services, such as health insurance and financial support, by partnering with local groups and national systems. For example, in the Philippines, STEP helped farmers' cooperatives set up health insurance that was connected to the country's national health system. The program works to understand why some people are excluded and helps governments and communities build better support systems that include everyone. STEP tracks its success by measuring how many people gain access to social protection, like health insurance, and how their lives improve, such as feeling more connected to their community. Successful programs not only help people get practical support but also build skills, friendships, and participation in community activities, helping them feel included and valued in society.

❑ ILO's STEP aids inclusion

d. World Bank Approach

The World Bank works to help people who might be left out or excluded from society, focusing on factors like gender,

❑ World Bank aids inclusion

age, disability, income level, where people live, and their cultural background. They pay special attention to groups such as women, children, people with disabilities, and poor or minority communities. By looking at these factors, the World Bank understands why some people face more challenges and works to find ways to help them, especially during risks like natural disasters, conflicts, or health problems. They use special tools to assess these risks and help countries prepare for future challenges, making sure that vulnerable groups are included in decisions and programs.

***Education Exclusion —
The Struggle for Equal Opportunity***

In India, even though there are reserved seats for Scheduled Castes (SCs) and Scheduled Tribes (STs) in universities, many of these seats remain unfilled, showing a deeper problem of exclusion. In Kerala, Dalit and Adivasi students still face challenges in accessing higher education, despite policies meant to help them. Many of these students drop out due to barriers like poverty, lack of support, and social discrimination. This highlights how systemic issues in education continue to leave some groups behind, making it harder for them to succeed and reach their full potential.

❑ Inclusive support focus

The World Bank's work isn't just about poverty—it also focuses on people who might not be poor but still face exclusion, like those affected by social discrimination. Their goal is to reach 500 million vulnerable people by 2030, especially women and children, by providing targeted help to reduce risks and improve inclusion. They recognize that different problems, like financial struggles or lack of access to services, can combine to make life harder for some people. By understanding these challenges, the World Bank can create better programs to ensure that everyone, no matter their situation, has the support they need to succeed.

1.3.9 Lessons for India from global practices.

❑ Social exclusion challenges

Social exclusion in India is a major issue, deeply rooted in systems like the caste system, which divides people into different social groups. This division often restricts access to essential opportunities such as education, employment, and social participation, particularly for Dalits, Adivasis, women, and



religious minorities. The challenges of social exclusion have been further complicated by globalization, which has disrupted traditional support systems, altered job markets, and pushed marginalized groups out of their communities. In India, social exclusion is not only about poverty but also about discrimination based on caste, gender, or religion, which makes it harder for many to fully engage in society.

❑ Promoting equality policies

To address social exclusion, it is crucial to create policies that promote equality for all people. This includes ensuring equal access to education, providing strong social safety nets, and dismantling the systems that perpetuate exclusion. Thinkers like Nobel laureate Amartya Sen argue that caste-based divisions hinder India's progress and prevent the country from reaching its full potential. Looking at how other countries have tackled social exclusion can offer valuable lessons. Many successful strategies focus on preventing exclusion before it starts, through measures like early interventions in education and employment, protecting against discrimination, and providing clear paths for reintegration into society for those who have been excluded.

❑ Addressing inequality inclusively

Overcoming social exclusion in India will require addressing deep, historical inequalities and ensuring that everyone, regardless of their background, has the opportunity to succeed. This is a long-term effort, but it is essential for building a more just and fair society. Successful countries focus on empowering vulnerable communities, ensuring that economic growth benefits all, and eliminating discriminatory practices. They also invest in social protection systems, such as healthcare, housing, and unemployment benefits, to make sure no one is left behind. The United Nations stresses the importance of investing in education, healthcare, and jobs, especially for the most vulnerable. In India, this will require strong cooperation between the government, businesses, and communities to create effective policies and ensure that everyone is included in the country's growth and progress.

Summarised Overview

In this unit, we delved into the critical role of the Indian Constitution in promoting inclusion and addressing social exclusion through comprehensive legal, constitutional, and institutional frameworks. The significance of Fundamental Rights, Directive Principles of State Policy, and Reservation Policies is highlighted, as they play a key role in combating discrimination and providing equitable opportunities to marginalized groups. Provisions like Articles 14, 15, 16, and 17 focus on ensuring equality, prohibiting discrimination, and advocating for affirmative action. The chapter also examines pivotal legislations such as the Prevention of Atrocities Act and the Protection of Civil Rights

Act, which protect marginalized communities from violence and discrimination, while institutions like the national commissions for Scheduled Castes, Scheduled Tribes, and Women work tirelessly to uphold social justice. Judicial activism and landmark judgments have been instrumental in advancing the cause of social inclusion, though challenges remain in areas like corruption, inefficiency, and intersectionality in programs for education, employment, and healthcare. By drawing on global practices, such as initiatives by the United Nations and the European Union, the chapter provides valuable insights and lessons for enhancing India's mechanisms of inclusion, aiming to create a more just and equitable society.

Self-Assessment Questions

1. What is social exclusion, and why is it a concern in democratic societies?
2. How does the Indian Constitution address social exclusion through legal provisions?
3. List the major constitutional articles that promote equality in India.
4. What are the main objectives of the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act?
5. How do the Directive Principles of State Policy guide the government in reducing social exclusion?
6. What lessons can India learn from the United Nations' Sustainable Development Goal 10?
7. What are the key barriers to effective implementation of anti-discrimination policies in India?

Assignments

1. How does the Right to Equality (Article 14) address social exclusion in India, and what challenges exist in its implementation?
2. Explain the interplay between Fundamental Rights and the Directive Principles of State Policy in promoting social justice and inclusion in India.
3. Evaluate the effectiveness of the Prevention of Atrocities Act in safeguarding marginalized communities, and identify potential improvements.
4. Analyze the impact of reservation policies in promoting social inclusion and reducing inequalities, and discuss any criticisms or limitations.
5. How have landmark judgments like *Vishaka v. State of Rajasthan* played a role in addressing gender-based exclusion in India?
6. What are the roles of national commissions like the National Commission for Scheduled Castes and the National Commission for Women in advancing equality, and how do they differ?
7. Critically analyze the limitations of the Protection of Civil Rights Act and discuss additional measures required to combat untouchability in India.

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU

BLOCK 2

Dimensions of Social Exclusion in India



UNIT 1

Political and Economic Dimensions

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ learn about political and economic exclusion and its impact on marginalized communities in India
- ▶ know how caste, class, gender, and ethnicity contribute to exclusion and its social effects
- ▶ assess how government policies and legal frameworks address exclusion and their effectiveness
- ▶ examine various dimensions of exclusion like caste-based voting, displacement, and slums to understand exclusion in practice

Background

In our fast-paced lives, we often overlook the simple, everyday moments that shape our sense of well-being. The warmth of the sunrise, the comfort of a cup of coffee, or the laughter of loved ones—these familiar comforts become so routine that we rarely pause to appreciate them. Caught in the whirlwind of deadlines and ambitions, we seldom reflect on how precious these moments truly are. But what if we took a step back and realized that what we consider a “normal” day might be a distant dream for someone else?

For many, the basic privileges we take for granted—like access to steady work, secure housing, or the freedom to shape one’s future—are far from reality. In India, millions face stark political and economic exclusion, trapped in cycles of poverty, discrimination, and inequality. As we go about our daily lives, many find themselves alienated from the very systems that are meant to protect and empower them. Marginalized communities, whether defined by caste, gender, or class, are often denied the opportunities that allow others to thrive.

In a nation where rights such as voting, education, healthcare, and financial stability are seen as fundamental, these individuals experience a different reality—one where these basic rights remain inaccessible, and dreams of a “normal” life seem forever out of reach. This contrast underscores the deep divisions in society, as the marginalized are left behind, powerless and unseen, in a system that promises opportunity to all but delivers it to a few. In this chapter, we explore the complexities of political and economic exclusion in India, examining how these divides create barriers that prevent millions from fully participating in the nation’s progress.

Keywords

Exclusion, Discrimination, Marginalization, Inequality, Governance, Globalisation

Discussion

Social exclusion in India means that certain groups of people, like Dalits, tribal communities, and women, are left out from opportunities and rights that help them live better lives. This exclusion has two main parts: political and economic. Politically, these groups often don’t have a say in decisions that affect them because they have limited representation in the government and face barriers in accessing the political system. Economically, they struggle to find good jobs, quality education, healthcare, and other basic services, which keeps them in poverty. These problems are connected, as discrimination in politics can make it harder for people to get better economic opportunities, and the lack of economic resources can prevent them from having a voice in politics.

2.1.1 Political Exclusion

□ Political exclusion weakens democracy

Political exclusion occurs when certain groups are denied the right to participate in political decisions, such as voting, joining political organizations, or freely expressing their views. This exclusion often stems from factors like gender, ethnicity, religion, social class, or disability. When large segments of the population are left out, it weakens democracy by preventing everyone from having an equal voice in shaping their country’s future.



❑ Barriers limit political participation

❑ Exclusion fuels unrest, inclusion fosters equity

❑ Political exclusion creates inequality in India

❑ Various groups face political barriers

❑ Exclusion weakens democracy and representation

Exclusion can take many forms. It can be formal, through unjust laws that limit voting or participation, or informal, through social prejudices that discourage certain groups from engaging in politics. This is particularly true for women, ethnic minorities, economically disadvantaged individuals, and people with disabilities. These barriers prevent them from fully engaging in political processes, thus denying them a say in decisions that affect their lives.

Such exclusion can lead to significant societal issues. When people feel shut out from the political system, it can spark protests, unrest, or even violent conflicts. In response, marginalized groups often seek alternative ways to make their voices heard and ensure that decisions are made fairly and inclusively. Ensuring that everyone, regardless of background, can participate in political life is crucial for building a just and equitable society for all.

2.1.1.1 Political Exclusion in India

Political exclusion in India is a big problem that stops many people from fully participating in politics. Some groups are denied basic rights like voting or running for office. Others do not get the same resources as powerful groups, making it harder for them to be involved in politics. Many communities are left out because of their gender, religion, or social background, creating an unfair system where only certain people have a strong political voice.

Different groups face different types of exclusion. Women are often pushed out of politics because of traditional beliefs and a lack of support. Migrants who move to new cities for work often struggle to vote or be involved in local politics. Ethnic and religious minorities sometimes face discrimination, making it difficult for them to get fair representation. These barriers prevent many people from having a say in how the country is run.

When people are excluded from politics, it weakens democracy. Fewer people vote, and those from marginalized communities are not properly represented in government. This can lead to social tensions and even conflicts, as people feel unheard and frustrated. Democracy is supposed to give everyone an equal voice, but political exclusion makes that difficult.

There are many reasons why this problem exists, including bureaucratic hurdles, economic inequalities, and social traditions that discourage certain groups from participating. Corrup-

tion and a lack of transparency also make politics harder to access. If India wants to strengthen its democracy, it must create fairer systems that allow all citizens—regardless of gender, caste, or background—to take part in political decisions.

A District Shaped Like a Salamander!

Did you know about Gerrymandering ? It happens when politicians redraw the lines of voting areas to help their own party win. They use two main tricks: "packing", where they put lots of voters from the other party into one district, and "cracking", where they spread those voters across many districts to weaken their votes. This idea started in 1812, when a district was made to look like a salamander! Though it's legal, many people think it's unfair because it can make elections feel rigged. Some are working to create fairer maps to solve this problem and make elections more honest!

2.1.2 Role of Caste, Class, and Gender in Political Exclusion in India

In India, caste, class, and gender work together to create significant political exclusion, especially for marginalized groups such as Dalit women. The caste system plays a major role in limiting political participation and representation. It creates barriers that prioritize caste identity over merit, leading to exclusion from major political spaces. This results in discriminatory alliances and a lack of opportunity for lower-caste communities to engage fully in the political process.

❑ Caste, class, and gender limit political participation

❑ Dalit women face triple discrimination

Women in India, particularly those from lower castes, face multiple layers of discrimination that hinder their political involvement. They experience lower political participation rates, the burden of household responsibilities, and limited leadership opportunities due to societal norms. Strict mobility restrictions make it difficult for women to engage in politics, with the challenges compounded by both gender and caste discrimination. This intersectionality creates a "triple burden" for Dalit women, who face discrimination based on gender, caste, and economic status.

Although government reservation policies aim to address some of these issues by providing a degree of political representation, systemic power relations still persist, limiting



❑ Systemic barriers limit true inclusion

❑ Women face barriers in politics

❑ Patriarchy and systemic barriers limit women's political power

❑ Migration and lack of voting options hinder democracy

real change. Political representation for marginalized groups remains restricted, and barriers to full participation continue. The intersection of caste, class, and gender in India continues to shape the political landscape, presenting persistent challenges to achieving an inclusive democracy.

2.1.3 Exclusion in Democratic Processes

Even though India is a democracy, many people still face barriers to political participation, especially women. Women are often kept out of important political decisions and not given enough chances to run for elections. Even though studies show that women candidates often win elections more than men, political parties still do not give them enough opportunities. This makes it difficult for women to have a strong voice in shaping the country's future.

Another major problem is systemic barriers that make it harder for certain groups to participate in politics. Patriarchal political structures, where men dominate leadership roles, prevent women from gaining power. Many women also lack family and party support, making it even more difficult to enter politics. Other challenges include low media coverage, few seats in legislative bodies, and economic struggles that stop people from running for office.

Political exclusion also affects migrant voters—people who move from one place to another for work. Many migrants cannot vote because there are no remote voting options for them. Since India's first election in 1951, nearly one-third of voters have missed the chance to vote due to migration. These barriers weaken democracy by preventing large sections of the population, including women, migrants, and lower-caste communities, from having a say in governance. To make democracy fairer, India needs better electoral policies, social reforms, and institutional changes.

2.1.4 How Caste Affects Voting in India

Caste plays a major role in Indian elections, especially in rural areas. Many voters choose candidates based on caste identity rather than their abilities or ideas. Political parties understand this and often select candidates from specific castes to win support. They also form alliances with different caste groups to secure votes, creating strong vote banks that influence elections.

Electoral Bonds – A Mysterious Way to Fund Elections!

Have you ever heard of electoral bonds? Introduced in 2018, they are a special way to fund elections in India! These bonds allow people and companies to donate money to political parties, but here's the catch – the donations are totally anonymous! No one knows who is giving the money or how much they're donating. While some believe this makes donations more transparent and helps prevent corruption, others worry it could give wealthy companies or individuals too much power over elections. It's a mysterious system that adds an intriguing twist to India's elections!

❑ Caste-based alliances shape political mobilization

❑ Caste-based politics hinders unity and accountability

❑ Mandal Commission deepened caste-based politics

People from larger caste groups tend to vote for leaders from their own community, believing they will better represent their interests. At the same time, smaller caste groups sometimes form alliances with others to gain political power. Over the years, caste-based political mobilization has led to the rise of regional parties which focuses on empowering historically oppressed communities.

While caste-based politics helps some communities gain representation, it also creates problems. It divides people based on caste, making elections more about identity than real issues like development, jobs, and education. Politicians often focus on pleasing their caste supporters instead of working for everyone, which reduces accountability. This system also reinforces caste hierarchies, making it harder for Indian society to move beyond caste-based divisions.

The Mandal Commission reforms in 1990 made caste even more important in politics by expanding reservations for marginalized communities. While this increased political opportunities for many, it also deepened caste-based voting patterns. As a result, caste remains a powerful force in Indian elections, shaping how people vote and how politicians compete for power.

2.1.5 Disenfranchisement of marginalized groups

Political exclusion in India deeply affects marginalized communities by denying them basic rights and opportunities (Kabeer, 2000). Groups like Dalits, tribal communities, and



❑ Marginalized communities face multi-layered political exclusion

❑ Lack of representation perpetuates poverty and social struggles

❑ Exclusion reinforces inequality and limits social mobility

❑ Women face limited political representation and support

religious minorities—making up nearly 250 million people—often struggle to participate in politics (Jaffrelot, 2010). Many face citizenship rights denial, limiting their ability to vote or take part in decision-making (Kumar Mishra & Shiva Prasad, 2020). Economic marginalization also keeps them poor and restricts access to jobs and resources (Jeffrey, Jeffery, & Jeffery, 2022). Social segregation pushes them to the edges of society, while institutional barriers, such as discriminatory rules, make it even harder for their voices to be heard (Dupont, 2016).

These challenges affect their daily lives in many ways. Unequal access to basic needs such as healthcare, education, and jobs makes it difficult for them to improve their conditions. They also have restricted political representation, meaning there are fewer leaders from their communities to fight for their rights. As a result, poverty and social struggles continue from generation to generation. Many of these problems are deeply rooted in society, making them hard to change.

When marginalized communities are excluded from politics, they have less power to improve their situation (Kabeer, 2000). They struggle with reduced social mobility, making it difficult to move up in society (Jeffrey, Jeffery, & Jeffery, 2022). Their voice in governance is weak, leaving them unable to influence laws and policies that could support them (Jaffrelot, 2010). This leads to economic vulnerability, which makes it harder to escape poverty (Kumar Mishra & Shiva Prasad, 2020). Over time, these issues reinforce historical inequalities, keeping these communities at a disadvantage (DeWall, 2013).

Even though the government has introduced policies to help these groups, progress has been very slow. Many marginalized people still face serious struggles in gaining equal political and social rights. True change will require stronger efforts to ensure that every citizen—regardless of their caste, religion, or background—has an equal say in shaping India's future.

2.1.6 Denial of political representation and participation

In India, many groups struggle to get fair political representation, especially women and Dalits. Women face several challenges when trying to participate in politics. In the past, nationalist movements did not focus much on women's political rights, and even today, there are not enough reserved seats for them in legislatures. Politics is still controlled by men, and women often do not get enough support from their families or

political parties. These barriers make it harder for women to take on leadership roles and have a strong political voice.

Dalit women face even greater challenges because they experience dual discrimination—both as women and as Dalits (Kabeer, 2000; Menon, 2015). They are often excluded from public spaces dominated by higher castes, denied access to important resources, and even harassed when they hold elected positions (Jaffrelot, 2010). In political meetings, they are frequently ignored or silenced, limiting their ability to influence decision-making (DeWall, 2013). At the national level, women make up only about 8% of the Lok Sabha, showing how difficult it is for them to enter politics (Laxmikanth, 2020). Expensive elections also make it hard for women to compete fairly, since they generally have fewer financial resources and less party backing (Chavan, 2008; Ganguly-Scrase & Scrase, 2009).

❑ Dalit women face dual discrimination and political exclusion

India's democracy has also faced global criticism, with some reports calling it an "electoral autocracy," meaning that while elections are held, many democratic freedoms are weakening (Jaffrelot, 2010). When democracy is not strong, marginalized groups such as women and Scheduled Castes find it even harder to secure fair representation (Menon, 2015; Kabeer, 2000). If these challenges are not addressed, true democracy—where everyone has a voice—will remain out of reach (Austin, 1999). Ensuring fair representation is therefore key to building a just and equal society (Laxmikanth, 2020).

❑ Weak democracy hinders fair representation for marginalized groups

The Anti-Defection Law in India

Did you know that India has a law to stop politicians from changing parties just to gain power? It's called the Anti-Defection Law, created in 1985 to ensure that members of Parliament or state assemblies stay loyal to their political parties. If a member switches parties, they can be disqualified! This helps keep the political system stable by stopping political "jumping" for personal gains. While the law aims to prevent chaos, some argue it limits freedom since it can force politicians to stay with parties they no longer agree with.

2.1.7 Barriers to Women's Political Participation in India

Women in India face many challenges when it comes to participating in politics. One of the biggest problems is



❑ Patriarchy and discrimination limit women's political participation

❑ Violence and harassment limit women's political participation, especially for Dalit women

❑ Low literacy, resources, and representation hinder women's political participation

❑ Bureaucratic barriers hinder migrant voter participation

patriarchal societal norms, which limit women's roles in public life (Menon, 2015). Many still believe that a woman's primary duty is to take care of the home and family, making it harder for them to enter politics. Discriminatory attitudes also exist, where people doubt women's ability to be leaders (Kabeer, 2000). As a result, women often struggle to be taken seriously in political spaces (DeWall, 2013).

Another major issue is violence and intimidation. Women in politics frequently face threats, harassment, and even sexual violence, which discourages them from speaking out or taking leadership roles (Jaffrelot, 2010). Studies show that 24% of Indian men have committed sexual violence, creating a dangerous environment that limits women's participation in public life (Chavan, 2008). Dalit women, in particular, face even greater discrimination. They are often denied information, silenced in political meetings, and harassed when they try to take leadership positions (Menon, 2015).

There are also structural challenges that make political participation difficult for women. Low literacy rates—only 65.46% of women can read and write—mean that many lack the education needed to engage in politics (Jeffrey, Jeffery, & Jeffery, 2022). Women also have fewer financial resources and minimal representation in political parties, making it harder for them to run for office (Ganguly-Scrase & Scrase, 2009). As a result, only 14% of elected members in India's national parliament are women (Laxmikanth, 2020). To change this, India needs strong social, economic, and political reforms to ensure that women have equal opportunities to lead and shape the country's future (Austin, 1999).

2.1.8 Political Exclusion of Internal Migrants in India

Millions of internal migrants in India face serious challenges when trying to participate in elections. Bureaucratic obstacles, such as complex voter registration and strict documentation rules, make it difficult for them to register as voters in their new locations (Dupont, 2016). Many migrants lack proper identity documents, and government processes often favor long-term residents, leaving migrants without a political voice (Kumar Mishra & Shiva Prasad, 2020).

Migrants also struggle with structural challenges that limit their rights. Many government welfare programs are linked to a person's home state or region, meaning migrants often lose access to essential benefits when they move (Saglio-Yatzimirsky

❑ Migrants face loss of benefits and limited rights due to mobility

❑ Migrant mobility limits political participation and reinforces exclusion

❑ Development-induced displacement harms vulnerable communities

❑ Displacement disrupts livelihoods and harms indigenous communities

& Landy, 2014). Social security schemes and other entitlements are often restricted to people who can prove long-term residence in a specific place, making life harder for those who frequently move for work (Kabeer, 2000).

Because of these mobility-related barriers, many migrants fail to vote in elections. Changing locations frequently makes it difficult to keep voter registration updated, and many migrants cannot vote in their current place of residence (DeWall, 2013). As a result, their political influence remains weak, even though they make up a large part of India's workforce. This lack of political representation worsens their economic and social struggles, keeping them trapped in a cycle of poverty and exclusion (Ganguly-Scrase & Scrase, 2009).

2.1.9 Development-Induced Displacement

Development-induced displacement (DID) is a major issue in India, where large-scale projects like dams, mining, and urban expansion have forced millions to leave their homes (Kumar Mishra & Shiva Prasad, 2020). While these projects aim to improve infrastructure and economic growth, they often harm vulnerable communities, particularly tribal groups, farmers, and the poor (Kabeer, 2000). The Sardar Sarovar Dam on the Narmada River displaced over 200,000 people, many of whom struggled to secure proper compensation. Similarly, the Tehri Dam in Uttarakhand uprooted entire villages, pushing families into poverty and disrupting their livelihoods (DeWall, 2013).

Displacement in India happens in two ways: primary displacement, where people are directly removed for a project, and secondary displacement, which occurs due to environmental damage or loss of resources (Dupont, 2016). Many displaced people rely on agriculture or forests for survival, but when their land is taken away, they face unemployment and food insecurity (Saglio-Yatzimirsky & Landy, 2014). The Polavaram Dam project is expected to displace nearly 400,000 people, mostly from tribal communities, while mining projects in Odisha and Chhattisgarh have devastated indigenous populations by taking away their ancestral lands without fair compensation (Kumar Mishra & Shiva Prasad, 2020).

Since India's independence, an estimated 60 to 65 million people have been displaced due to development projects, with dams alone affecting over 16 million (Jaffrelot, 2010). Unlike refugees, internally displaced persons (IDPs) due to development often receive little or no assistance (Kabeer, 2000). Even



❑ Displaced people face inadequate resettlement and support

❑ Fair resettlement and inclusive development are crucial for justice

❑ Nationalism can lead to exclusion and power imbalance

❑ Nationalism can marginalize cultural and religious minorities

❑ Nationalism can create economic inequality and limit opportunities

when resettlement plans exist, they are poorly implemented, leaving displaced families without proper housing, jobs, or access to basic services (DeWall, 2013). In urban areas, projects like the Central Vista Redevelopment in Delhi and slum clearance drives in Mumbai have displaced thousands, often without adequate rehabilitation (Dupont, 2016).

While development is crucial for India's progress, it should not come at the cost of human suffering. Governments and corporations must ensure fair resettlement, proper compensation, and alternative employment opportunities for those displaced. Sustainable and inclusive development policies, along with stronger legal protections, are needed to prevent further marginalization of vulnerable communities. Ensuring that progress benefits everyone—not just a privileged few—will lead to a more just and balanced society.

2.1.10 Nationalism and Social Exclusion

Nationalism is the idea of loving and supporting one's country. While it can bring people together, sometimes it can also lead to the exclusion of certain groups. In politics, nationalism can make one group more powerful than others, pushing minorities out of important decisions. For example, if a country only allows one group of people to have a say in government, others may feel left out. Sometimes, leaders use nationalism to keep all power in one place, making it harder for smaller regions to have control over their own rules.

Nationalism can also affect culture and society. If a country says that only one language or religion is the "true" identity of the nation, people who speak different languages or follow different religions may feel excluded. This can make people feel like they don't fully belong, even if they have lived in the country for generations. For example, if a government forces schools to teach only one language, children who speak a different language at home may struggle to fit in.

Nationalism can even impact the economy. Some countries may focus only on supporting their own businesses and industries while ignoring trade with others. While this might seem good at first, it can also make things more expensive and limit opportunities for people who rely on international work or trade. In some cases, nationalist policies may favor certain regions over others, making some areas richer while others stay poor.

Nationalism can be both good and bad. It helps people feel proud of their country, but when it is used to exclude others, it can create unfairness in politics, culture, and the economy. The key is to balance national pride with fairness, making sure that everyone feels included, no matter their background.

2.1.1 Communal Riots in India

❑ Politics and religious manipulation fuel communal riots

Communal riots in India happen for many reasons, and they can be very complicated. One big reason is politics. Sometimes, political leaders use religion to get more votes during elections. They might make one religious group feel like the other is a threat, which can cause fear and anger. When people believe their leaders, they might start fighting with others from different communities, especially when politicians don't stop the violence or punish those responsible (Jaffrelot, 2010).

❑ Social divisions and extremism fuel communal tensions

Social reasons also play a part in communal riots. People might have old grudges or misunderstandings about other communities. If they don't talk and understand each other, these feelings can grow worse. Extremist groups sometimes take advantage of this by spreading lies and hate, making people more likely to fight. Even during festivals or public events, small arguments can quickly turn into big fights if people feel their religious beliefs are being disrespected (DeWall, 2013).

❑ Economic competition can spark communal conflict

Economic issues are another reason. When there aren't enough jobs, houses, or land, different communities might start competing against each other. If one group feels like they are missing out or being treated unfairly, this can lead to anger and clashes. In cities, job competition can also create rivalries between groups, leading to conflicts that sometimes escalate into riots (Jeffrey, Jeffery & Jeffery, 2022; Ganguly-Scrase & Scrase, 2009).

Certain events can quickly trigger communal riots. For example, during religious festivals or processions, people from different communities might clash if there's already tension. Disputes over religious places, like what happened during the Babri Masjid demolition in 1992, can spark large-scale violence. Also, rumors spread through social media or word of mouth can make people panic and act aggressively without knowing the full truth (Kabeer, 2000). Understanding these reasons can help prevent such conflicts and bring about peace.

2.1.12 Ethnicity

❑ Ethnicity is based on shared culture and heritage, contributing to India's diversity

❑ Ethnic and caste-based discrimination limits opportunities for Dalits and Adivasis

❑ Ethnic minorities, especially women and children, face discrimination and limited opportunities

Ethnicity is about groups of people who share common things like language, culture, and traditions. It helps people feel connected to others with similar backgrounds. Unlike race, which is based on physical traits, ethnicity is more about shared cultural practices and heritage. In India, there are many different ethnic groups, such as the Indo-Aryans, Dravidians, Mongoloid groups, and Adivasis (tribal communities). Each of these groups has its own language, customs, and history. India's rich diversity comes from people who have moved to the country over time, bringing their unique traditions and cultures.

However, this diversity sometimes leads to unfair treatment or discrimination. Some ethnic groups, such as Dalits (Scheduled Castes) and Adivasis (Scheduled Tribes), often face challenges in getting good jobs, education, and respect in society. Even though laws exist to protect them, practices like untouchability still make life difficult for these communities. One of the main reasons for this discrimination is the caste system, which has existed for centuries. People from lower castes often have fewer opportunities, earn lower wages, and face social exclusion (Kabeer, 2000; DeWall, 2013).

In addition, ethnic minorities, like the tribal groups in north-eastern India, also struggle to be included in politics and the economy. Women from these communities face even bigger challenges because they often don't get equal opportunities for education and jobs. These groups often earn less and have to do tough, low-paying jobs. Children from these communities also find it hard to get a good education because they face discrimination in schools. Their voices are not always heard in political decisions, and this makes it harder for them to improve their lives (Jeffrey et al., 2022; Mishra & Prasad, 2020). (Recap:)

To help solve these problems, the Indian government has introduced policies that give special support to disadvantaged groups, like affirmative action in education and government jobs. Social movements have also helped bring attention to the discrimination these groups face and have pushed for change. While there has been some progress, there is still much work to be done to make sure everyone, no matter their ethnicity or caste, gets fair treatment and equal chances in life.

2.1.13 Regionalism

Regionalism is the idea that certain areas within a country have their own unique identity, culture, and interests. People in these regions may want more control over their own affairs instead of following rules made by the national government. In some cases, they may ask for more local decision-making power, and in extreme cases, they might even want to separate and become independent. There are different types of regionalism. Supra-state regionalism happens when different regions work together for a common goal, like coastal areas fighting for better policies. Inter-state regionalism occurs when a region wants more autonomy because it feels different from the rest of the country. Intra-state regionalism happens inside a single country, where smaller areas within a state demand more control. While regionalism helps preserve local cultures and traditions, it can also create divisions and conflicts.

❑ Regionalism seeks local autonomy but can cause division and conflict

❑ Regionalism can marginalize minorities and fuel tensions

❑ Caste discrimination worsens regionalism and marginalizes lower-caste groups

In India, regionalism often affects marginalized groups like Scheduled Castes (SC) and Scheduled Tribes (ST). In some areas, people feel their culture and land are under threat due to migration and government policies. This is especially true in North-East India, where communities want more control over their resources. Sometimes, these issues lead to protests or even violence. Regional political parties often focus on the needs of the local majority group, which can leave out minorities. This can make tribal communities feel ignored and increase tensions between different groups (Mishra & Prasad, 2020; Saggio-Yatzimirsky & Landy, 2014).

Caste discrimination makes regionalism even more complicated. Dalits and lower-caste groups often face exclusion not just because of caste but also because of where they live. Many of them struggle with poor living conditions, violence, and a lack of political power. This makes it difficult for them to improve their lives. Regionalism can sometimes make these inequalities worse, as local leaders may not focus on the needs of these marginalized groups.

2.1.14 Linguism and linguisticism

India is home to more than 1,600 languages, making it one of the most linguistically diverse countries in the world. However, this diversity also creates challenges. Linguism happens when people are overly loyal to their own language, leading to social divisions. Linguicism goes a step further—it occurs



❑ Linguicism marginalizes smaller languages and limits opportunities

❑ Language-based divisions lead to conflicts over identity and power

❑ Balancing linguistic diversity with national unity and fairness

❑ Economic exclusion challenges

when some languages are treated as more important than others, making speakers of smaller languages feel left out (Annamalai, 2001). For example, people who don't speak dominant languages like Hindi or English may struggle to get jobs or education. This unfair treatment can keep them in poverty and make it harder for them to participate in society. In some cases, languages that are not widely used start to disappear, taking away a part of people's culture and history (Annamalai, 2001).

After India became independent, the government tried to solve language conflicts by creating states based on languages in 1956. This made people feel more connected to their local cultures, but it also led to new challenges. Some groups started demanding more recognition for their language, sometimes leading to tensions and conflicts (Brass, 2009). For example, in Tamil Nadu, people protested against making Hindi a compulsory language in schools because they feared it would weaken their own language and identity. Similarly, conflicts between Marathi and Kannada speakers in Belgaum and language-based tensions in Assam have caused long-term disputes. These conflicts show that language is not just about communication—it's also about power, identity, and fairness (Brass, 2009).

The government has promoted Hindi as the main language, but many people in states like West Bengal and Tamil Nadu strongly resist this. Minority language speakers, like those who speak Urdu, often face disadvantages, as they don't always have access to education and government services in their language. Many small languages are also at risk of disappearing because younger generations prefer to learn English or Hindi for better job opportunities (Annamalai, 2001; Brass, 2009). If languages vanish, the cultures and traditions linked to them may also be lost. To protect linguistic diversity, India needs to support all languages equally and ensure that every language group gets fair opportunities. By respecting and preserving all languages, India can maintain both unity and cultural richness (Annamalai, 2001).

2.1.2 Understanding Economic Exclusion

Economic exclusion happens when certain groups of people are blocked from fully participating in the economy. This affects immigrants, refugees, women, and minority communities, making it harder for them to get good jobs and improve their financial situation. Some common problems include lack of job opportunities, low wages, and unstable working con-

ditions. Many people also struggle because they live in poor neighbourhoods with limited access to jobs, schools, and essential services, which makes escaping poverty even harder.

❑ Discrimination drives economic exclusion

One major reason for economic exclusion is discrimination. Ethnic, religious, and linguistic minorities often face higher poverty rates and have fewer chances to access good education and healthcare. This leads to fewer job opportunities, keeping them stuck in poverty. Since many of these problems are systematic, they can't be solved by individuals alone—governments and policies need to step in to create fairer job markets and better opportunities for these groups.

The Tragedy of the Commons

The Tragedy of the Commons happens when people overuse shared resources because they think about their own benefit instead of the long-term good. Imagine a group of farmers using the same field—if everyone keeps adding more cows, the land becomes overgrazed and useless. This idea explains real-world problems like overfishing, deforestation, and pollution, where natural resources get used up too fast, harming everyone in the end. Taking care of shared resources is important to avoid long-term damage!

❑ Economic exclusion harms society

Economic exclusion doesn't just affect individuals—it hurts entire communities and even countries. When large groups of people are left out of the economy, it can lead to social unrest, competition for resources, and economic slowdowns. History shows that countries with extreme economic exclusion, like in the former Yugoslavia, faced serious conflicts as a result.

2.1.2.1 Poverty and Exclusion in India

❑ Poverty, exclusion, and inequality in India

Poverty and exclusion remain serious challenges in India, affecting millions, especially those from marginalized communities like Dalits, Adivasis, and women. The caste system and deep-rooted discrimination limit access to education, healthcare, and stable jobs (Jaffrelot, 2010; Kabeer, 2000). Dalits face social and economic barriers, while Adivasis, living in remote areas, lack essential resources and opportunities (Kumar Mishra & Shiva Prasad, 2020). Women, regardless of caste, struggle with inequality in wages and job opportunities (Chavan, 2008). These challenges make it difficult for many to escape poverty and improve their lives.



❑ Forms of exclusion and its impact

Exclusion takes different forms. Poor infrastructure in rural areas prevents access to education and healthcare, while economic exclusion keeps people from starting businesses or finding stable employment (Dupont, 2016). Social discrimination based on caste and gender continues to limit opportunities, and political exclusion means marginalized groups have little voice in policymaking (DeWall, 2013). Together, these factors trap entire communities in cycles of poverty, making upward mobility nearly impossible without strong government intervention (Saglio-Yatzimirsky & Landy, 2014).

❑ Ineffectiveness of some poverty-reduction policies

Although India has implemented policies to reduce poverty, some have backfired or been ineffective. Economic reforms in 1991 led to rapid growth but widened inequality, as wealth concentrated among the rich (Ganguly-Scrase & Scrase, 2009). Policies like demonetization and the Goods and Services Tax (GST) hurt small businesses and informal workers, making it harder for them to earn a stable income (Kumar Mishra & Shiva Prasad, 2020). A shift towards indirect taxation has placed a heavier financial burden on the poor while benefiting large corporations (Tica, Globan & Arčabić, 2021). Even social welfare programs like MGNREGA and the National Food Security Act, though well-intended, often suffer from poor implementation and fail to address long-term economic disparities (Jeffrey, Jeffery & Jeffery, 2022).

To truly tackle poverty and inequality, India needs more inclusive economic policies, stronger labor protections, and improved access to quality education and healthcare. Fairer taxation, better job opportunities, and targeted support for marginalized communities can create a more just society. Addressing these root causes will not only lift millions out of poverty but also help India build a stronger and more equitable future for all.

2.1.2.2 Unemployment, Job Security and Informal Work

❑ Job insecurity and wage disparity

Unemployment and job insecurity are major challenges in India, particularly for marginalized groups such as Dalits, Adivasis, and women. These communities often face systemic discrimination that limits their access to stable and well-paying jobs. Despite some progress, wage disparities persist, with marginalized workers often receiving lower wages and having fewer opportunities for career growth. Women, who make up nearly half of the population, remain significantly underrepresented in

the workforce, particularly in higher-paying sectors. Even government programs aimed at improving employment opportunities often fail to create meaningful change due to deep-rooted inequalities.

India's 'Jobless Growth' Problem

India's economy is growing fast, but jobs are not being created at the same speed. This is called jobless growth, where businesses expand, but many people remain unemployed or underemployed. To keep up with its rising population, India needs at least 10 million new jobs every year, but currently, less than half of that is being created. This makes it harder for young people to find stable work, even as the economy grows.

❑ Informal sector insecurity

The informal sector, which includes farming, small businesses, and daily wage labour, employs a large portion of India's workforce but offers little job security or legal protection. Workers in these roles, especially contract labourers, often earn significantly less than those in permanent positions (Jeffrey, Jeffery & Jeffery, 2022). The lack of regulation in informal employment allows employers to exploit workers by paying lower wages, offering no benefits, and avoiding labour protections (Dupont, 2016). This insecurity makes it difficult for workers to plan for the future, contributing to cycles of poverty and exclusion (Kabeer, 2000; DeWall, 2013).

❑ Wage discrimination by gender, caste

Wage discrimination remains a pressing issue in both formal and informal sectors, influenced by gender, caste, and job type. Women consistently earn less than men, particularly in informal jobs where wages are unregulated (Chavan, 2008; Jeffrey, Jeffery & Jeffery, 2022). Lower-caste workers face similar discrimination, often earning less than their upper-caste counterparts despite having the same education and experience (Jaffrelot, 2010; Kabeer, 2000). While formal jobs provide some labour protections, wage gaps persist, and contract workers continue to face instability and exploitation (Dupont, 2016). Without stronger enforcement of labour laws, these inequalities will continue to hinder economic mobility.

Job security plays a crucial role in ensuring fair wages and stable employment. Workers in permanent jobs not only earn more but also have greater bargaining power through unions and collective action (DeWall, 2013; Jeffrey, Jeffery & Jeffery,



❑ Job security and stability

❑ Policy changes for inclusive economy

❑ Income inequality, gender & caste disparities

❑ Wage gaps caused by education, gender, caste, and sector

2022). Secure employment in organized sectors, such as government jobs and large companies, provides stability, benefits, and career growth opportunities. However, rigid labour market policies and economic challenges prevent many workers from transitioning into stable employment, keeping them trapped in temporary or insecure jobs (Tica, Globan & Arčabić, 2021).

Enforcing anti-discrimination laws, expanding skill development programs, and strengthening social protections for informal workers can create a more inclusive job market. Bridging the gap between formal and informal sectors by ensuring fair wages and job security will not only reduce poverty and social exclusion but also drive sustainable economic growth.

2.1.2.3 Income and Wage Disparity

Income and wage disparity in India is a major issue, with a small percentage of the population controlling most of the wealth while the majority struggles to make ends meet. In 2017, the richest 1% of Indians owned 73% of the country's wealth, while the poorest half saw little to no growth in their earnings (Ganguly-Scrase & Scrase, 2009; Tica, Globan & Arčabić, 2021). One main reason for this inequality is the gender wage gap. On average, men earn significantly more than women, with women making about 33% less than men. This gap is even worse in industries like agriculture and manufacturing, where women often earn half of what men do (Chavan, 2008; Jeffrey, Jeffery & Jeffery, 2022). Education also plays a role, as people with better education generally earn more. However, even among educated workers, women and marginalized communities such as Scheduled Castes (SC) and Scheduled Tribes (ST) continue to face lower wages (Jaffrelot, 2010; Kabeer, 2000).

Wage disparities in India are driven by multiple factors, including education, gender inequality, caste, and labour market divisions. People with higher education tend to secure better-paying jobs, but access to quality education is uneven, particularly for rural and lower-income groups (Jeffrey, Jeffery & Jeffery, 2022). Women also face significant barriers in securing high-paying jobs due to social and cultural expectations that prioritize family responsibilities over careers (Chavan, 2008). Caste discrimination limits economic opportunities for people from lower castes, making it harder for them to earn fair wages (Jaffrelot, 2010). The type of employment also impacts wages—those in the organized sector, such as government jobs, receive higher pay and job security, while workers in the unorganized

sector, like casual labourers, earn less with no benefits (Dupont, 2016; DeWall, 2013).

Gender-based economic exclusion further worsens inequality, as women in India struggle with limited job opportunities, lower wages, and poor working conditions. Female workforce participation is extremely low, ranging between 24-30%, one of the lowest among developing nations (Chavan, 2008; Jeffrey, Jeffery & Jeffery, 2022). Many women work in informal jobs that offer little job security or financial stability. Limited access to education, especially in rural areas, reduces their chances of securing better-paying jobs. Healthcare access is also a challenge, with poor maternal care leading to high mortality rates (DeWall, 2013). Cultural beliefs often reinforce the idea that women should stay at home, while weak enforcement of property and land rights laws makes them even more financially vulnerable (Jaffrelot, 2010).

❑ Gender-based exclusion worsens economic inequality

❑ Policies for education, equal pay, and gender equality can reduce economic inequality

Addressing these disparities requires policies that improve access to education, ensure equal pay for men and women, and create opportunities for marginalized communities. Strengthening laws that protect women's rights, increasing job security in the informal sector, and changing outdated cultural attitudes toward gender roles are crucial steps toward reducing economic inequality. By implementing these changes, India can create a more inclusive and fair society where everyone has the opportunity to succeed.

2.1.2.4 Gender and Economic Exclusion

Gender inequality in India affects many aspects of life, including jobs, education, healthcare, and social traditions. Women have fewer job opportunities, and even when they work, they often earn much less than men (Chavan, 2008; Kabeer, 2000). In India, only about 24–30% of women are part of the workforce, one of the lowest rates among developing countries (DeWall, 2013). Many women work in informal jobs with low pay and no job security, making them especially vulnerable to poverty and exclusion (Dupont, 2016; Saglio-Yatzimirsky & Landy, 2014). They also face challenges in education, particularly in rural areas, which reduces their chances of securing good jobs (Jeffrey, Jeffery & Jeffery, 2022), while access to healthcare remains poor, with maternal mortality continuing to be a serious issue (Kumar Mishra & Shiva Prasad, 2020). Cultural beliefs further reinforce inequality, as women are often expected to stay at home rather than participate in the workforce

❑ Gender inequality challenges



(Jaffrelot, 2010; Ganguly-Scrase & Scrase, 2009). Moreover, laws protecting women's rights to land and property are not always effectively enforced, making them even more economically vulnerable (Kabeer, 2000; DeWall, 2013). Globalization and technological changes have deepened these inequalities, as women from marginalized groups often struggle to access opportunities in the changing economy

2.1.2.5 Caste and Economic Exclusion

- ❑ Caste system's economic exclusion

The caste system in India has long contributed to economic exclusion, particularly for lower castes like Dalits and Adivasis. These groups face barriers in accessing resources, jobs, and social rights, limiting their chances for economic advancement. Even though policies like job reservations aim to bridge this gap, lower castes still earn significantly less than upper castes. Studies show that despite economic growth, caste discrimination continues to affect wages, employment opportunities, and occupational mobility.

- ❑ Caste-based exclusion in multiple sectors

Beyond income, caste-based exclusion extends to education, healthcare, and housing, reinforcing social hierarchies and cycles of poverty. While affirmative action policies have helped to some extent, wealth concentration among upper castes maintains economic inequalities. Addressing this requires strict enforcement of anti-discrimination laws, increased awareness, and structural changes in economic policies to ensure equal opportunities for all castes.

2.1.2.6 Agricultural Crisis and Rural Economic Exclusion

- ❑ Agrarian society and caste impact on land ownership

India's agrarian society has long been shaped by a system where landlords, peasants, and agricultural labourers play distinct roles. While landlords own large portions of land, many small farmers either work on rented land or struggle with their own small plots. Agricultural labourers, often from marginalized communities, have no land of their own and rely on daily wages (DeWall, 2013; Jaffrelot, 2010). Though efforts have been made to improve their conditions, deep-rooted social structures like the caste system still impact land ownership and economic opportunities, making it difficult for many farmers and laborers to escape poverty (Kabeer, 2000; Dupont, 2016).

Over time, farming in India has evolved significantly. The British-era land policies worsened conditions for poor farmers,

❑ Evolution of farming and challenges for small farmers

and while post-independence land reforms aimed to correct these issues, many remained landless (Jaffrelot, 2010; Kumar Mishra & Shiva Prasad, 2020). The Green Revolution brought technological advancements, benefiting some farmers but leaving others behind. Today, modern changes such as contract farming and migration to cities have provided new opportunities but also introduced fresh challenges, as small farmers struggle to compete with large agricultural corporations and fluctuating market prices (Jeffrey, Jeffery & Jeffery, 2022; Dupont, 2016).

The Harsh Reality of Farming in India

Many farmers in India struggle with money problems because of high costs, bad weather, and low prices for their crops. Every year, over 10,000 farmers take their own lives because they can't repay small loans, sometimes as little as ₹20,000 to ₹50,000. Maharashtra, one of the worst-affected states, sees more than 3,000 farmer suicides annually. This shows how tough farming can be and why better support is needed to help farmers survive.

❑ Ongoing exclusion in farming for marginalized groups

Despite efforts to improve fairness, marginalized groups like Dalits and women continue to face exclusion and discrimination in farming. Dalit farmers often receive lower wages and limited access to markets, while women struggle to gain land rights and economic independence (Chavan, 2008; DeWall, 2013). Poor access to education, healthcare, and justice further worsens their conditions. This exclusion contributes to the broader agricultural crisis, where many farmers remain trapped in poverty, unable to break free from systemic inequalities and economic instability (Kabeer, 2000; Jaffrelot, 2010).

2.1.2.7 Economic Vulnerability

❑ Economic vulnerability and marginalization in India

In India, many people face economic vulnerability, which means they are at risk of becoming poor due to things like losing their job, having health problems, or not having enough resources. A large number of people work in jobs that don't offer job security or benefits, like in the informal sector. If something goes wrong, like an illness or economic downturn, these workers may lose their income. Many families can't afford healthcare, so even small health problems can cause big financial issues. People from marginalized communities, like Dalits and tribal groups, often face more challenges because they struggle to access basic resources like loans or markets, making their situation worse.



The Experience Problem in India!

In India, many young people face a tricky problem when looking for jobs: you need experience to get a job, but to gain experience, you need a job! This creates a challenge for over half of college graduates who struggle to find work because they don't have enough real-world experience. To help solve this, things like internships, small projects, and learning new skills online are becoming more popular. Nowadays, companies are looking for practical skills, not just degrees, which is helping many young people land their first jobs!

❑ Social exclusion and caste-based discrimination in India

❑ Economic vulnerability and social exclusion reinforce each other for marginalized groups

❑ Urban slums result from economic exclusion, overcrowding, and lack of services

Another big issue in India is social exclusion, where certain groups are treated unfairly or left out of important parts of society, like education, jobs, or healthcare. This is mostly due to the caste system, which divides people into different social groups. Dalits and other lower-caste people often face discrimination, get lower wages, and don't have the same opportunities as higher-caste people. Many marginalized groups also live in remote areas with limited access to schools or hospitals, which makes it harder for them to improve their lives. Without political power or proper representation, their needs are often ignored.

Economic vulnerability and social exclusion are linked together. If someone is excluded from important parts of society, like education or jobs, they may struggle financially. On the other hand, not having enough resources can make people feel more left out. The most affected groups are Dalits, tribal communities, and religious minorities, who face both poverty and discrimination. They have a harder time escaping poverty and are often left out of development efforts that could help improve their lives.

2.1.2.8 Slums and Economic Exclusion

In India, urban slums are areas where many poor people live in overcrowded conditions without access to basic services like clean water, healthcare, and education. These slums are a result of economic exclusion, meaning that the people living there don't have the same opportunities to improve their lives as others. Many people in slums work in low-paying jobs with little job security, which makes it hard for them to save money or make their living conditions better. They also struggle because they can't get loans or credit to improve their homes or start

businesses. A lot of people move from villages to cities looking for better work, but this often leads to overcrowded slums where there aren't enough services to support everyone.

Insight Box: Dharavi - The Billion-Dollar Slum

Dharavi, Mumbai's largest slum, is more than a crowded settlement—it's a thriving economic powerhouse! Within its cramped spaces, Dharavi generates an estimated \$1 billion annually through thousands of small businesses, including leather workshops, pottery, recycling, and textiles. Nicknamed "the heartbeat of Mumbai's informal economy," Dharavi proves that innovation and entrepreneurship can flourish even in the most unexpected places.

❑ Affordable housing, poor urban planning, and limited services lead to slum challenges

The lack of affordable housing is another problem, with many people being pushed into slums because real estate in cities is too expensive (Dupont, 2016). Because of poor urban planning, cities do not always have enough space or services for the growing number of people, making the problem worse (Saglio-Yatzimirsky & Landy, 2014). This economic exclusion causes several challenges for those living in slums. Many people live in unhealthy conditions, which leads to diseases and malnutrition (DeWall, 2013). Children in slums often cannot attend school regularly because their families need them to work or because the schools are far away (Jeffrey, Jeffery & Jeffery, 2022). This makes it harder for them to escape poverty when they grow up.

India needs to focus on improving life in slums. This means making sure people have access to important services like healthcare, education, and clean water. It also means helping slum residents get access to financial services, like loans or savings accounts, so they can improve their homes and businesses. Better urban planning is needed to create more affordable housing and prevent slums from growing. It's important to involve slum residents in decisions about how to improve their communities, making sure their voices are heard and their needs are met.

2.1.2.9 Financial Exclusion and Access to Credit

In India, many marginalized groups face significant barriers when trying to access banking services. One of the main challenges is the lack of proper documents, such as birth certificates or income proofs, which are often required to open a bank



❑ Barriers to banking include lack of documentation, distance, and high costs

❑ Gender and cultural barriers hinder financial inclusion

❑ Microfinance helps empower low-income communities

account. Many people also don't understand how banks work, leading them to rely on expensive informal financial services. For those living in rural areas, banks are often far away, and people with disabilities may face physical barriers when trying to access bank services. The financial costs associated with banking, like transportation or maintaining a minimum balance, can also be too high for lower-income individuals.

Cultural and societal factors further restrict access to banking, especially for women, who may face additional hurdles like needing male guarantors or experiencing gender discrimination. Many people also feel nervous or intimidated by the formal banking system, making them less likely to seek help from banks. While initiatives like Pradhan Mantri Jan-Dhan Yojana have helped increase account ownership, many of these accounts remain unused due to the persistent barriers mentioned above. To improve financial inclusion, it is crucial to focus on providing better education, improving accessibility, and implementing policies that address the unique needs of marginalized communities.

Microfinance in India offers an important solution for low-income communities by providing small loans that help people start or grow their businesses. This is especially helpful since many people do not have the necessary money or documents to borrow from traditional banks. Microfinance supports job creation, helps small businesses, and empowers women by giving them financial independence. The Indian government also promotes microfinance through programs like the Pradhan Mantri MUDRA Yojana, which allows small businesses to borrow money without collateral, and Self-Help Groups (SHGs), which help women save and borrow money collectively. Despite challenges like high-interest rates and over-borrowing, microfinance continues to play a crucial role in helping people lift themselves out of poverty and grow their businesses.

2.1.2.10 Impact of Globalization and Economic Reforms

Globalization has created significant opportunities for many countries by boosting trade, investment, and job creation. It has helped people buy goods at lower prices and has lifted millions into the middle class, particularly in countries like China and India (Ganguly-Scrase & Scrase, 2009; Tica, Globan & Arčabić, 2021). This economic growth has led to higher incomes, better job prospects, and increased access to products

❑ Globalization boosts growth but worsens inequality

❑ Economic liberalization fueled growth but deepened inequality

❑ Need for inclusive policies to ensure shared economic growth

and services, improving quality of life for many. However, it has also deepened inequalities, as skilled workers benefit from higher wages, while low-skilled workers face job losses or stagnant wages (Kabeer, 2000). Globalization has allowed big companies and wealthy individuals to accumulate even more wealth, sometimes avoiding taxes by shifting assets abroad, which exacerbates wealth disparities (DeWall, 2013). Some countries also relax labor protections to attract foreign investment, resulting in poor wages and working conditions for many workers (Jeffrey, Jeffery & Jeffery, 2022).

Economic liberalization in India, which began in 1991, played a main role in this transformation. It reduced business restrictions and opened up the economy to foreign investments, accelerating growth and creating more opportunities for trade (Ganguly-Scrase & Scrase, 2009). However, the benefits were not evenly distributed. Urban areas and large corporations reaped the majority of the rewards, while informal workers and rural industries faced increased competition (Dupont, 2016). Informal workers found it difficult to thrive as they competed with larger businesses, leading to lower wages and job instability (Kumar Mishra & Shiva Prasad, 2020). Meanwhile, rural industries gained access to new markets and improved technology, but struggled to compete with big companies that had the advantage of economies of scale (Saglio-Yatzimirsky & Landy, 2014).

While economic liberalization helped India's economy grow, it also presented challenges for many workers and rural industries. Some people found better opportunities, but many informal workers and small businesses saw their prospects diminish. To ensure that economic growth benefits everyone, the government needs to create policies that support small businesses, protect workers' rights, and provide equal opportunities for rural industries to compete in a globalized economy. By fostering a more inclusive environment, economic liberalization can help reduce inequalities and ensure that growth is shared more broadly.

In conclusion, political and economic exclusion in India remains a major challenge to achieving true democracy and fairness. Many marginalized groups, such as Dalits, Adivasis, women, and migrants, face discrimination that limits their access to political power and economic opportunities. Although some progress has been made through policies and social movements, deep-rooted barriers still exist. To strengthen democracy, India must remove these obstacles with stronger laws, better political representation, and fair economic policies. Moving forward, the

country must ensure equal opportunities for everyone, allowing all citizens to contribute to its growth and development.

Summarised Overview

Political and economic exclusion in India continues to affect marginalized groups such as women, Dalits, and religious minorities, despite constitutional guarantees of equality. These communities face significant barriers to full political participation and leadership due to caste-based discrimination, patriarchal structures, and bureaucratic hurdles. Economically, they struggle with low wages, job instability, and limited social mobility, worsened by wage discrimination and the absence of adequate social security. Additional factors like caste-based voting, gender bias, regional disparities, and the growth of urban slums deepen these inequalities. While government initiatives like reservation quotas and welfare programs aim to address these challenges, deep-rooted structural barriers persist. To create a truly inclusive society, a comprehensive approach is required—one that combines political representation, economic reforms, and social equity measures to tackle the root causes of exclusion.

Self-Assessment Questions

1. Define political exclusion. How does it weaken democracy?
2. What are the major barriers to political participation for marginalized communities in India?
3. How do caste and class reinforce economic exclusion in India?
4. Why are women underrepresented in Indian politics?
5. What is development-induced displacement, and how does it impact vulnerable communities?
6. How does regionalism contribute to political and economic exclusion?
7. Explain the concept of "vote banks" and their impact on democratic representation.
8. What are the consequences of linguistic exclusion in India?
9. How do slums represent economic exclusion in urban India?
10. Suggest policy recommendations to reduce economic exclusion in India.

Assignments

1. What is political exclusion, and how does it affect democracy in India?
2. Discuss the impact of caste, class, and gender on political participation in India.
3. How does economic exclusion manifest in Indian society, particularly in urban and rural settings?
4. Explain how caste influences voting behaviour in Indian elections.
5. What are the barriers to women's political participation in India?
6. Describe the political and economic challenges faced by internal migrants in India.
7. Analyze the role of nationalism in social exclusion. How does it affect minority communities?
8. Discuss the economic vulnerability of marginalized groups in India.
9. How do development projects contribute to displacement and economic exclusion? Provide examples.
10. What measures can the Indian government take to address political and economic exclusion?

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Suggested Reading

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3. Auerbach, A. M. (2019). *Demanding development: The Politics of Public Goods Provision in India's Urban Slums*. Cambridge University Press.

Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU



UNIT 2

Caste and Gender

Learning Outcomes

After upon completion of this unit, the learners will be able to:

- ▶ comprehend the historical and ideological foundations of the caste system
- ▶ analyze the intersectionality of caste and gender in social exclusion
- ▶ evaluate government policies and social movements addressing caste and gender issues
- ▶ identify contemporary challenges in caste and gender-based discrimination

Background

In India, caste and gender oppression are closely linked, with each reinforcing the other. While caste has long been a source of discrimination, women, especially those from lower castes, face an even greater struggle. The deep-rooted patriarchy in society sees a girl child as vulnerable, subject to limiting stereotypes, and often denies her basic freedoms and opportunities.

The ancient Code of Manu, a text that shaped social norms, stated that women do not deserve independence: "sthree swathanthryam na arahathii." This idea has been ingrained for centuries, with women often viewed as inferior and bound by strict roles. But for women born into lower castes, the weight of this oppression is doubled. Not only are they women in a patriarchal society, but they are also marginalized by their caste.

This chapter will explore how caste and gender oppression intersect in India, and how women from lower castes bear the brunt of both. It's about understanding their struggles, their resilience, and the ongoing fight for equality and freedom in a society still shaped by these age-old inequalities.

Keywords

Caste Discrimination, Gender Inequality, Social Marginalization, Intersectionality, Empowerment

Discussion

❑ Research requires ethical responsibility alongside knowledge pursuit

❑ Caste system divides people by social groups, affecting job, status, and opportunities

❑ Origins and rigidity of caste system

Caste and gender have been significant factors shaping Indian society for centuries. While the caste system creates hierarchical divisions based on birth, gender norms establish rigid roles for men and women, often marginalizing women and non-binary individuals. The interplay between caste and gender results in social exclusion, limiting access to resources, opportunities, and rights. Despite legal reforms and social movements advocating for equality, caste- and gender-based discrimination persist in various forms, affecting education, employment, and personal freedoms. This chapter explores the caste and gender dimensions of social exclusion in India, analyzing historical and contemporary perspectives.

2.2.1 Caste

Caste is a social system where people are divided into different groups based on family background and traditions, especially in South Asia, particularly in Hindu society. These groups, called "castes," include Brahmins (priests), Kshatriyas (warriors), Vaishyas (merchants), and Shudras (labourers). In this system, caste is inherited from one's parents, meaning a person remains in the same caste for life. This influences their job, social status, and even whom they can marry, as marrying within one's caste is traditionally expected. Higher castes generally have more privileges, while lower castes often face discrimination and fewer opportunities.

The caste system has existed for thousands of years and is believed to have started around 1500 BCE with the arrival of the Indo-Aryans. Early Hindu texts like the Rig Veda mention the four main castes, or varnas, based on people's occupations and social roles (Jaffrelot, 2010). Initially, caste mobility was possible, but over time, the system became hereditary and rigid, preventing people from changing their caste (Banerjee &



Ghosh, 2018). Hindu mythology also reinforced this system, with the Rig Veda describing castes as originating from different parts of the god Brahma's body, making people believe that caste divisions were divinely created (Yadav, 2006).

As the caste system became stricter, religious laws such as the Manusmriti further cemented these divisions, making them an accepted part of Hindu society (Jaffrelot, 2010). The system was also patriarchal, with men holding most power and passing down caste status through male family lines (Banerjee & Ghosh, 2018). The spread of the Indo-Aryans led to local people being categorized into lower castes or even considered "Untouchables," who were excluded from the varna system altogether (Yadav, 2006). Over time, rigid rules about marriage and jobs made caste discrimination even stronger, affecting people's social and economic mobility (Sahu, 2020).

❑ Caste rigidity and discrimination

❑ Ongoing caste-based inequality

❑ Persistent caste-based discrimination

Although India has passed laws to reduce caste-based discrimination, its impact is still felt today in many areas, including politics, education, and job opportunities. Efforts like affirmative action and reservations in schools and government jobs have helped uplift lower castes, but social inequalities persist. While the caste system may not be as rigid as in the past, its influence continues to shape Indian society in many ways.

2.2.1.1 Understanding Caste as a Social Structure

The caste system in India is a deeply rooted social structure that continues to influence various aspects of life, despite efforts to reduce its impact. It creates significant challenges in social, economic, and political spheres, particularly for marginalized communities like Dalits. Discrimination limits access to education, healthcare, and employment, reinforcing cycles of poverty and exclusion. While urbanization and affirmative action policies have provided some opportunities for mobility, caste-based barriers remain strong, especially in rural areas. Women from lower castes face compounded disadvantages due to both caste and gender discrimination. Although social movements and legal reforms have challenged caste inequalities, systemic discrimination persists, requiring sustained efforts for a more inclusive and equitable society.

2.2.1.2 Caste as an Ascribed Status

Caste is an ascribed status, meaning people are born into a social position that they cannot change throughout their lives. In India's caste system, society is divided into different

❑ Caste as a fixed, inherited status

castes, where higher castes have more privileges, while lower castes face discrimination and fewer opportunities. A person's job, social life, and power are all decided at birth, with little chance of moving up. Unlike achieved status, where people earn their position through effort, caste is fixed and inherited, making it one of the strictest social hierarchies. Even today, this system influences social life, though laws now aim to reduce caste-based inequality.

2.2.1.3 Purity and Pollution

❑ Purity and pollution in caste system

The idea of purity and pollution is a main part of the Indian caste system, deciding how people are treated based on their birth. The system places Brahmins at the top as the "purest," while Shudras and Dalits are seen as "impure" (Jaffrelot, 2010). This belief led to strict rules, where lower castes were not allowed to enter temples, use public spaces, or even share water with higher castes (Yadav, 2006). A Dalit's shadow was once considered polluting, and a Brahmin eating food prepared by a lower-caste person would be seen as "contaminated" (Banerjee & Ghosh, 2018). These restrictions also shaped where people lived—higher castes had central village spaces, while lower castes were pushed to the outskirts (Sahu, 2020).

The Origin of the Term "Dalit"

The term "Dalit," meaning "broken" or "oppressed," was coined by Dr. B.R. Ambedkar to give a voice to the communities historically marginalized by the caste system in India. Ambedkar used this powerful term to replace the derogatory label "Untouchable" and unite these communities in their fight for equality and social justice.

❑ Purity, pollution, and caste continuity

My life, the idea of purity and pollution was linked to karma and rebirth. It was believed that doing "impure" acts could result in being born as an animal or an outcast in the next life. This system made sure caste barriers were passed down through generations, trapping people in their social position. Even though India has laws against caste discrimination today, these old beliefs still affect society in many ways.

2.2.2 Caste-Based Exclusion and Discrimination

Caste-based exclusion and discrimination is a social issue in India where people are treated unfairly based on their



caste, which is a social group they are born into. The caste system divides society into different groups, with higher castes receiving more privileges and lower castes facing disadvantages. People from lower castes, especially Dalits (formerly known as "Untouchables"), often face discrimination in education, employment, and even access to basic services like healthcare. Despite legal reforms to reduce caste-based discrimination, these practices are still prevalent in many parts of the country, limiting opportunities and contributing to inequality. This issue affects the social and economic well-being of millions of people in India.

2.2.2.1 Untouchability and Its Contemporary Forms

❑ Untouchability and caste discrimination

Untouchability is a harsh form of discrimination found in the Indian caste system, where certain communities, mainly Dalits (formerly "untouchables"), are treated as inferior and excluded from society. These groups have historically been forced into the lowest-status jobs, such as cleaning waste, and are often denied access to public spaces like temples, wells, and even common roads. They are considered "impure," and social interaction with them is avoided by upper castes. While India's Constitution (Article 17) officially abolished untouchability, laws like the Protection of Civil Rights Act (1955) and the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act (1989) were introduced to protect Dalits from discrimination. However, caste-based exclusion still exists in many parts of India.

❑ Global caste discrimination and ongoing struggles

Although untouchability is most well-known in India, similar discrimination exists in other parts of the world. Groups like the Burakumin in Japan, Baekjeong in Korea, and Romani people in Europe have also faced social exclusion and marginalization (Jaffrelot, 2010). Even though the law punishes caste discrimination, deep-rooted social traditions make it difficult to fully erase these unfair practices (Banerjee & Ghosh, 2018). The struggle for equality continues, as many Dalit communities still face economic hardships, restricted access to education, and social segregation, making true justice a work in progress (Sahu, 2020).

2.2.2.2 Unseeability: Extreme Forms of Caste-Based Exclusion

In the Indian caste system, Dalits (formerly called "untouchables") face extreme discrimination, to the point where they

❑ Dalit "unseeability" and exclusion

❑ Dalit exclusion and abuse

❑ Rising atrocities against Dalits

❑ Dalit women face severe abuse

are treated as if they are invisible to higher castes. This is known as "unseeability," where Dalits are considered so impure that even being seen by an upper-caste person is believed to bring pollution (Jaffrelot, 2010). Because of this, they are forced to live in separate areas, away from higher castes, and are banned from using public wells, temples, or even the same drinking cups as others (Yadav, 2006). In schools, Dalit children are often made to sit separately from upper-caste students, further reinforcing their exclusion from society (Banerjee & Ghosh, 2018).

The consequences of this discrimination are severe. Dalits face complete social exclusion, affecting millions of people. They are often denied basic needs like clean water, electricity, and sanitation, making life incredibly difficult (Sahu, 2020). Many are also forced into degrading jobs such as cleaning human waste (manual scavenging) because other work is denied to them (Banerjee & Ghosh, 2018). On top of this, Dalits often suffer verbal, physical, and even sexual abuse, making their daily lives full of hardship and fear (Sripad, 2023). Even though caste discrimination is illegal today, this "hidden apartheid" still exists in many parts of India, keeping Dalits trapped in a system of inequality (Menon, 2015). (Recap:)

2.2.2.3 Atrocities Against Dalits: Violence, Boycotts, and Oppression

Atrocities against Dalits in India have been rising at a disturbing rate over the past few years. According to the National Crime Records Bureau (NCRB, 2022), more than 57,500 cases of violence and discrimination were reported against Dalits, reflecting a 13.1% increase from the previous year. The states with the highest numbers of these cases were Uttar Pradesh, Rajasthan, Madhya Pradesh, and Bihar, with Uttar Pradesh alone accounting for nearly 24% of the total cases. These incidents highlight a growing and serious issue for Dalit communities across the country (Jaffrelot, 2010; Sahu, 2020).

Dalit women, in particular, face heightened levels of abuse. A study of 115 Dalit women revealed that 74% experienced caste-based discrimination, and nearly half were subjected to abusive or obscene comments. More than a third faced physical violence, and some were even victims of sexual assault (Banerjee & Ghosh, 2018). A real-life example from Rajasthan illustrates this, where a Dalit family was brutally attacked—their cattle fodder burned and the women beaten. Despite filing

a complaint, no police action followed, showing how deeply entrenched caste and gender bias remain (Sripad, 2023).

❑ Rising atrocities, low convictions

Looking at broader trends, the number of reported atrocities against Dalits has consistently increased. From nearly 43, 000 cases in 2018, the figure rose each year, reaching over 57, 500 in 2022 (NCRB, 2022). While increased reporting may partly explain the rise, the persistence of violence and exclusion shows that caste-based hostility remains strong. Conviction rates continue to be low—only about 15% of cases result in conviction—demonstrating the justice system’s ongoing struggle to address these crimes effectively (Menon, 2015; Varghese, 2024).

This rise in Dalit atrocities reveals deep-rooted caste-based prejudice and systemic challenges in ensuring justice. Despite efforts to address these issues, the persistence of violence, lack of accountability, and low conviction rates show that much more needs to be done to protect Dalit rights and fight discrimination.

2.2.3. Caste and Marriage Norms

❑ Caste-based marriage norms

Caste and marriage norms in India are deeply intertwined with social traditions and cultural expectations. In the caste system, marriage is often restricted to within one’s own caste, and inter-caste marriages are frowned upon or even met with violence in some areas. These norms have been in place for centuries, reinforcing caste divisions and maintaining social hierarchies. Despite legal advancements and increasing awareness, caste-based marriage practices continue to influence relationships and social acceptance, creating challenges for individuals who wish to marry outside their caste.

2.2.3.1 Caste Endogamy

❑ Caste endogamy limits marriage choices

Caste endogamy is a marriage practice where individuals are expected to marry within their own group, such as caste, religion, or social class. This tradition is seen as a way of preserving cultural values, protecting resources, and maintaining community ties (Srinivas, 1962). However, it also limits marriage choices, making it difficult for people from different backgrounds to connect. While some societies still strictly adhere to endogamy, many modern cultures are shifting toward more flexible marriage norms, allowing individuals to marry outside their group and fostering social integration (Béteille, 1996).

In India, caste endogamy plays a significant role in reinforcing the caste system and perpetuating social divisions. Marrying

❑ Caste endogamy reinforces caste divisions and inequality

❑ Caste endogamy reinforces social inequality and restricts mobility

❑ Anuloma marriages involve higher caste men marrying lower caste women

❑ Pratiloma stigma

within one's caste is viewed as essential for preserving "social purity" and maintaining social order (Dirks, 2001). Breaking this rule often results in ostracism from both family and community. Moreover, this system fosters inequality, particularly for lower-caste individuals who are denied opportunities for social mobility and economic improvement. Since caste is inherited through birth, endogamy ensures that these divisions continue across generations, making it difficult for individuals to transcend caste-based limitations (Béteille, 1996).

Endogamy also perpetuates social inequality by concentrating power, wealth, and opportunities within certain groups. Wealthy and influential families often use endogamy to maintain their social and economic dominance, making it more difficult for poorer individuals to rise (Srinivas, 1962). Endogamy can even contribute to reduced genetic diversity, leading to potential health risks associated with inbreeding (Fuller, 1996). In regions such as Kerala, caste endogamy was particularly strict, with communities like the Nambudiri Brahmins and Nairs adhering to rigid marriage rules. By the late nineteenth century, Kerala had more than 500 caste-based groups practicing endogamy, which deeply entrenched caste boundaries and restricted social mobility (Fuller, 1996).

2.2.3.2 Anuloma and Pratiloma Marriages: Caste Hierarchy in Marital Practices

In ancient India, the caste system played a major role in shaping marital practices, and two important types of inter-caste marriages—Anuloma and Pratiloma—had a direct impact on the social structure. Anuloma marriages occurred when a man from a higher caste married a woman from a lower caste. These marriages were generally tolerated, as they were considered to be in line with social norms or "with the grain" of the caste system (Srinivas, 1962). Ancient texts, such as the Manusmriti, even recognized these unions, though the children of such marriages were often assigned to intermediary castes rather than fully inheriting the father's high caste status (Sharma, 1990).

By contrast, Pratiloma marriages took place when a man from a lower caste married a woman from a higher caste. These unions were condemned as going "against the grain" and were considered socially disruptive. Traditional Hindu law codes strongly disapproved of such marriages, believing they threatened the hierarchical order of society. Children from Pratiloma unions were often placed in the lowest social categories,



sometimes even below the Shudras, thereby reinforcing caste discrimination (Sharma, 1990).

❑ Marriages reinforced caste hierarchy

These different types of marriages played a huge role in maintaining the social hierarchy. Anuloma marriages helped keep the caste system stable by creating new caste groups, while Pratiloma marriages were seen as a threat to this order. This system of marriage also impacted social mobility, as those in higher castes were more likely to marry within their group, while lower caste members faced strict limits on whom they could marry.

2.2.3.3 Honour Killing: Enforcing Caste-Based Marital Norms

❑ Honour killings tied to caste and patriarchy

Honour killings in India happen because of strict caste rules and the belief that families must protect their reputation. These violent acts mostly target people who marry outside their caste, especially in states like Haryana, Punjab, Rajasthan, and Uttar Pradesh. Families believe that inter-caste marriages ruin their honour and go to extreme lengths, including killing their own relatives, to stop such relationships. This is deeply connected to India's caste system and patriarchy, where maintaining caste purity is more important than personal choice or love (Banerjee & Ghosh, 2018; Sripad, 2023). Even though the Indian Constitution guarantees equality, these crimes continue because they are often ignored or even supported by local communities and groups like Khap Panchayats (Jaffrelot, 2010).

❑ Honour killings reinforce caste power and control marriages

These killings have a serious impact on inter-caste relationships, especially for Dalits, who face the highest risk. Many Dalit men have been attacked or killed by dominant caste families for being in relationships with upper-caste women. The violence includes not only murder but also kidnappings and attacks on entire families. Honour killings are used as a way to remind people of caste power, control who marries whom, and make sure that caste boundaries stay in place (Béteille, 1996). This fear keeps many people from choosing their partners freely, making love and marriage dangerous for those who go against caste traditions.

❑ Honour killings reinforce caste power and control marriages

Even though hundreds of honour killings have been reported in recent years, the real numbers are likely much higher because many cases are never recorded. Most of these crimes are either hidden by families or listed as regular murders, which makes it hard to get justice (Dirks, 2001). Because of strong caste and patriarchal traditions, the legal system struggles to punish those responsible (Sahu, 2020). Honour killings show how deep caste

discrimination still runs in India, affecting people's freedom to love and marry across caste lines. (Recap: Honour killings remain underreported, reflecting deep caste discrimination)

Honour killings in Kerala challenge the state's progressive image, showing that caste-based violence still exists. Since 2014, at least five honour killings have been recorded, mainly targeting individuals who married outside their caste. Notable cases include the 2018 murder of Kevin P. Joseph, a Dalit Christian, and the 2020 killing of Aneesh, who was stabbed to death by his wife's family for being from a lower caste (The Guardian, 2019; The News Minute, 2024). Experts believe that older generations play a big role in keeping caste divisions alive, and younger people often follow these ideas without questioning them. Institutions like the church and political parties also sometimes make it harder for inter-caste marriages to be accepted (Fuller, 1996; Kodoth & Eapen, 2005).

❑ Honour killings in Kerala highlight ongoing caste violence

❑ Honour killings in Kerala driven by caste purity and social hierarchies

The main reasons behind these killings include the fear of losing family honour, the belief in maintaining caste purity, and the desire to protect traditional social hierarchies (Srinivas, 1962). Marriages between different castes, especially when one person is from a lower caste, are often opposed. Even though Kerala is seen as a progressive state, these incidents show that caste-based discrimination is still strong. Between 2014 and 2016, the National Crime Records Bureau recorded five honour killings in the state, proving that this is not just an issue in other parts of India but a serious problem in Kerala as well (National Crime Records Bureau [NCRB], 2022).

2.2.4 Caste and Economic Stratification

Caste and economic stratification in India are closely linked, with the caste system playing a significant role in shaping people's economic opportunities and social mobility. Historically, certain castes have been assigned specific occupations, often limiting their access to better-paying jobs and resources. Higher castes tend to have more wealth and opportunities, while lower castes, especially Dalits, face systemic barriers that prevent them from improving their economic status. Despite legal reforms, caste-based economic inequality remains a persistent issue, affecting the lives and opportunities of millions.



2.2.4.1 Occupational Segregation and Caste-Based Division of Labour

Occupational segregation in the Indian caste system has long shaped the types of jobs people do, with specific roles assigned based on caste. Upper castes were typically landowners, while middle castes engaged in farming or artisanal work. Dalits, the lowest caste, were relegated to menial and degrading tasks such as street cleaning and scavenging. This rigid division of labour has created a deep economic divide, severely limiting the social mobility and economic opportunities for Dalits, reinforcing their marginalization (Béteille, 1996; Dirks, 2001; Srinivas, 1962).

❑ Caste-based job division

❑ Dalits face economic barriers

❑ Legal reforms help, but challenges persist

Dalits, particularly in rural areas, face significant barriers to economic advancement. They are often confined to low-paying, manual labour jobs and excluded from more prestigious and higher-paying occupations due to systemic discrimination, lack of education, and limited access to resources (Banerjee & Ghosh, 2018; Jaffrelot, 2010). Many are trapped in cycles of bonded labour, working to repay debts without earning enough to improve their financial standing. This keeps them entrenched in poverty and restricts their ability to break free from traditional caste-based roles (Sahu, 2020).

Though legal reforms and government policies aim to provide opportunities for Dalits, caste-based discrimination and economic exploitation continue to persist, especially in rural areas. However, with increasing urbanization and improved access to education, some Dalits have begun entering diverse professions and breaking away from traditional occupations. Despite these changes, challenges remain, including discrimination, lack of financial support, and limited access to networks. Continued efforts, both in terms of policy and social change, are needed to create broader opportunities for Dalits to achieve upward mobility and overcome historical inequalities (Varghese, 2024; Fuller, 1996; Kodoth & Eapen, 2005).

2.2.4.2 Caste Mobility in India: Barriers and Pathways

Caste mobility in India refers to the ways people can move up or down the social hierarchy, though it remains limited and unequal. People from higher castes generally have better chances of moving up, while marginalized groups face barriers like discrimination and poverty. Education plays a big role in

❑ Caste mobility is limited, despite new opportunities

helping people improve their social status, but access to good schools and jobs still depends a lot on caste. Sociologists note that mobility can happen when communities work together to improve their status or when individuals gain wealth and political power. Modern factors like reservation policies, urbanization, and globalization have created new opportunities, but challenges like social stigma and economic inequality still make it hard for lower-caste individuals to achieve the same success as those from privileged backgrounds. While some caste networks support economic progress, others reinforce divisions, making caste mobility a slow and complex process in India today.

2.2.5 Theoretical Perspectives on Caste and Exclusion

Theoretical perspectives on caste and exclusion help explain the deep social divisions in India. Concepts like the dominant caste show how certain groups hold power, while Sanskritization describes how lower castes try to improve their status by adopting the practices of higher castes. Homo Hierarchicus highlights how caste shapes social roles in a strict hierarchy, and Subaltern theory focuses on how marginalized groups, especially Dalits, are excluded from power. Dr. B.R. Ambedkar's work challenges caste-based oppression, advocating for Dalit rights and equality. Together, these ideas reveal the ongoing struggle for justice and equality in India.

2.2.5.1 Dominant Caste: Power and Influence in Rural India

The Dominant Caste Theory, introduced by M.N. Srinivas in 1959, explains how certain caste groups in India maintain power through a combination of economic, political, and social control. A caste becomes dominant when it has a large population, owns significant land, and exerts political influence (Srinivas, 1962; Béteille, 1996). Examples of dominant castes include the Jats and Yadavs in North India, the Lingayats and Vokkaligas in Karnataka, and the Marathas in Maharashtra. These groups not only control ritual status but also wield significant economic and political power, shaping social norms and decisions at local and regional levels (Srinivas, 1962; Jaffrelot, 2010).

❑ Dominant caste groups control power

Dominant castes maintain their influence through a variety of strategies. Economically, they own large amounts of land, invest in businesses, real estate, and education, and use their wealth to ensure continued control. Politically, they support



❑ Strategies used by dominant castes

candidates, form alliances, and influence government policies to protect their interests. Socially, they strengthen their networks by sponsoring cultural and religious events, further consolidating their position within society (Béteille, 1996; Jaffrelot, 2010). This cycle of economic and political influence ensures the continued dominance of these castes, reinforcing their power across generations.

❑ Land ownership and caste control

Land ownership plays an important role in the dominance of certain castes. Historically, upper castes controlled most of the agricultural land, while lower castes worked as labourers. Ownership of land grants not just financial power but also social authority (Dirks, 2001). Over time, some middle-ranked castes, like the Yadavs and Kurmis, have gained land and political influence. However, land remains a symbol of power, and marginalized communities still face challenges in accessing property. Despite progress in urbanization and modern policies promoting mobility, dominant castes continue to adapt their strategies to maintain influence, showing that caste-based inequalities remain deeply entrenched in Indian society (Srinivas, 1962; Béteille, 1996).

2.2.5.2 Sanskritization and Social Mobility

❑ Lower castes adopt higher-caste practices for social mobility

Sanskritization, a concept introduced by sociologist M.N. Srinivas, refers to the process by which lower castes in India attempt to improve their social standing by adopting the customs, rituals, and practices of higher castes, particularly the Brahmins. This process involves not just imitating the behaviour of higher castes but also embracing their values and beliefs. For example, lower castes may begin practicing Hindu rituals like Arti and Bhajan, changing their diets to become vegetarian, or adopting cleaner professions to elevate their status in the caste hierarchy. This phenomenon is observed across India, with lower castes seeking social mobility through the adoption of higher-caste customs to gain better opportunities, such as better jobs and social respect.

❑ Sanskritization influences cultural, linguistic shifts for social mobility

The process of Sanskritization also extends to cultural and linguistic changes. Lower castes may begin to incorporate Sanskrit words into their vocabulary or modify their speech patterns to align more closely with those of higher castes (Dirks, 2001). This shift in language and cultural practices reflects the deeper impact of Sanskritization, influencing not only actions and rituals but also the way people think and communicate. Interestingly, a reversal of this process, called "De-sanskritization,

" has also been noted, where higher castes sometimes adopt practices from lower castes (Béteille, 1996). Overall, Sanskritization highlights how lower castes strive for upward mobility by aligning themselves with the perceived cultural superiority of higher castes, demonstrating the layered nature of social stratification in India.

2.2.5.3 Homo Hierarchicus: Louis Dumont's Structuralist Perspective

Louis Dumont's book *Homo Hierarchicus* delves into the caste system in India, framing it as more than just a social structure but as a deeply ingrained belief system. He introduces the concepts of *homo hierarchicus* (hierarchical human) and *homo aequalis* (egalitarian human). In societies structured around *homo hierarchicus*, individuals are ranked based on hierarchy, with an emphasis on purity and impurity. Higher castes, such as Brahmins (priests), are regarded as pure, while lower castes, especially the untouchables, are seen as polluted. In contrast, *homo aequalis* represents Western societies, where equality and equal rights for all individuals are fundamental ideals.

❑ Caste as hierarchy vs. equality

❑ Purity, pollution, and caste hierarchy

❑ Caste as belief system vs. Western equality

The central concept of purity and pollution is key to Dumont's interpretation of caste. Higher-caste individuals are considered pure, while lower-caste people are seen as polluted, and this distinction shapes nearly all aspects of life—from marriage choices to occupational roles (Dumont, 1996). Although all castes are interdependent, with each performing essential functions in society, this separation sustains the hierarchy.

Dumont's analysis reveals that the caste system is not merely a social arrangement but a belief system that has shaped Indian society for centuries. This ideological framework defines social roles and relationships through the lens of purity and pollution, governing everything from daily interactions to cultural practices. Dumont contrasts this with Western societies, where the emphasis on equality challenges such hierarchical structures and promotes the belief that all individuals, regardless of their background, should be treated with equal rights and opportunities.

2.2.5.4 Subaltern Perspective: Dalit Voices and



Agency

❑ Subalternity and Ambedkar's advocacy

The term subaltern refers to individuals or groups in society who hold lower positions and lack power, often representing marginalized communities, including the poor and lower castes. In postcolonial studies, subalterns are those excluded from decision-making and political participation. Dr. B.R. Ambedkar is a central figure in understanding subalternity in India, particularly in relation to the Dalits, historically seen as "untouchables." Ambedkar not only highlighted the struggles of these communities but also advocated for their agency—empowering them to take control of their lives and fight for their rights. He believed in their potential to challenge the oppressive systems that kept them marginalized, especially the caste system, and worked towards giving them the tools to secure equality.

❑ Ambedkar's radical approach to caste

Ambedkar's approach to addressing subalternity was transformative. He viewed the caste system as an artificial division of society based on endogamy, where people from different castes could not marry or interact. For Ambedkar, caste was not just a social issue but a barrier to India's overall progress. He believed the caste system perpetuated discrimination by restricting people's freedom to choose their work and fostering a sense of inferiority. His solution was radical: rather than merely reforming certain practices, he sought to dismantle the caste system entirely, which he saw as essential for the nation's development and democracy. This contrasted with other reformers like Gandhi, who focused on improving interactions between castes but did not advocate for the complete abolition of caste.

❑ Ambedkar's lasting impact on caste and subalternity

Ambedkar's views on caste and subalternity continue to influence social movements and scholarship today. He argued that eliminating caste was not just a matter of social justice, but essential for India's future. His work in Dalit empowerment, including his advocacy for conversion to Buddhism as a means to escape caste, challenged the notion that subaltern groups were powerless. Instead, he showed that they could take action and change their circumstances. Ambedkar's radical vision has had a profound and lasting impact, inspiring movements for equality and justice in India. His ideas on caste remain central to discussions about power, hierarchy, and social justice in Indian society.

2.2.6 Gender-based exclusion

❑ Gender-based exclusion limits opportunities and development

Gender-based exclusion is a global issue where women, non-binary, and transgender individuals are treated unfairly because of their gender. This discrimination shows up in many areas such as politics, the economy, and social life, especially in countries facing conflict, like Yemen and Afghanistan. It limits opportunities for education and jobs, makes people more likely to experience violence, and takes away their ability to make decisions about their own lives (Sahu, 2020; Menon, 2015). Gender-based exclusion also prevents people from fully participating in the economy and leadership roles, which slows down economic growth, maintains inequality, and obstructs overall development (Banerjee & Ghosh, 2018; Yenilmez, 2021). In contexts such as Taliban rule in Afghanistan, women are completely shut out of public life, while in India, caste and gender intersections further intensify exclusion in both the labor market and social participation (Yadav, 2006; Varghese, 2024). This shows that gender-based exclusion is not only a matter of individual rights but also a barrier to collective progress and social justice.

The First Gender Park in India

Did you know that Kerala is home to India's first-ever Gender Park? Established in 2013, Gender Park in Kozhikode is a unique space dedicated to promoting gender equality and empowering people of all genders. It's a place where people come together to discuss important issues like women's rights, gender-based discrimination, and social inclusion. The park hosts workshops, research, and events to raise awareness and help create a more equal society. Gender Park plays a key role in challenging stereotypes and supporting policies that promote gender justice in Kerala and beyond!

2.2.6.1 Gender-based exclusion in India

Gender-based exclusion in India is a widespread problem that affects women in many ways. From birth, girls face disadvantages due to a preference for male children, leading to less attention to their health, education, and nutrition. Social norms often limit women's freedom and participation in the economy, treating them as second-class citizens in a patriarchal society. Economically, women have limited access to important resources like land and credit, and many work in low-paying

❑ Gender-based exclusion affects women's health, education, and rights

jobs. Poverty makes gender inequality worse, with poor families sometimes choosing to invest more in their sons. Women with other identities, like those belonging to lower castes or living with disabilities, face even greater challenges, such as a lack of basic rights, fewer opportunities, and increased vulnerability to violence. Despite laws that promise equality, the real implementation of these laws remains weak, leaving many women still excluded from full participation in society.

i. Economic Disparities

In India, gender-based economic disparities remain a significant concern, with women facing persistent challenges in earning equal wages, accessing financial services, and fully participating in the economy. On average, women earn only about 64 percent of what men earn for the same work (Yenilmez, 2021), highlighting a wage gap that limits their financial independence and security. Access to the financial sector is also uneven, particularly in rural areas where banking and credit services remain out of reach for many women, reducing their ability to invest in businesses or improve livelihoods (Kodoth & Eapen, 2005). Poverty further compounds these inequalities by restricting women's access to education and healthcare, thereby narrowing their chances for upward mobility and economic growth (Banerjee & Ghosh, 2018). In addition, cultural practices and weak property rights—especially in rural communities—continue to restrict women's ownership of land and assets, preventing them from achieving equal participation in both society and the economy (Béteille, 1996; Dirks, 2001).

❑ Economic disparities and limited financial access hinder women's progress

❑ Limited financial access and digital divide hinder women's economic participation

A major barrier for women in India is their limited access to the financial sector, which restricts their ability to achieve economic independence. Digital access reflects this gap: only 31 percent of women use the internet compared to 52 percent of men, limiting opportunities to benefit from online banking and digital financial services (Banerjee & Ghosh, 2018). Even when women hold bank accounts, many remain underutilized due to limited financial literacy and confidence in handling transactions (Kodoth & Eapen, 2005). Structural barriers also persist, such as requirements for a male family member's signature to open an account, complex bureaucratic procedures, high interest rates on loans, and limited physical access to banking facilities in rural areas (Béteille, 1996; Dirks, 2001). These obstacles make it difficult for women to start businesses, build savings, or manage personal finances. Despite these challenges, government initiatives like the Pradhan Mantri Jan Dhan Yojana have

made strides toward improving women’s financial inclusion by encouraging bank account ownership and expanding access to formal banking services (Yenilmez, 2021).

One of the most important ways to empower women financially in India is by improving their financial literacy, which refers to the ability to understand saving, investing, and managing money effectively. Financial literacy enables women to make informed decisions, access banking services, and strengthen their independence (Banerjee & Ghosh, 2018). Yet, studies show that nearly 80 percent of women in India face difficulties in understanding financial concepts, which prevents them from fully participating in the economy (Yadav, 2006; Yenilmez, 2021). This lack of knowledge not only restricts their personal financial growth but also reduces their ability to contribute to household and community development. Government and community initiatives such as the Pradhan Mantri Jan Dhan Yojana, financial literacy centers, and digital education programs are helping to bridge this gap by promoting awareness and inclusion (Kodoth & Eapen, 2005; Sahu, 2020). With more women gaining financial literacy, India can take significant steps toward reducing gender inequality, accelerating economic growth, and fostering a more inclusive society.

❑ Financial literacy is key to empowering women economically in India

ii. Educational Barriers

Gender discrimination in education creates significant challenges, particularly for girls. Poverty often forces families to prioritize boys’ schooling over girls’, while cultural norms and gender stereotypes continue to restrict girls’ educational opportunities (Banerjee & Ghosh, 2018; Yadav, 2006). Safety concerns, including gender-based violence, and harmful traditions such as child marriage and early pregnancy, further limit access to education (Sahu, 2020). Inadequate school infrastructure—especially the lack of proper sanitation facilities—adds to the problem, as does the expectation that girls take on domestic responsibilities rather than attend school. In some regions, over 40 percent of girls remain out of secondary school, and more than 60 percent of youth who cannot read are female, highlighting how gender inequality in education negatively impacts both individual futures and community development.

❑ Gender discrimination in education limits opportunities for girls

To overcome these barriers, there are several effective interventions. Financial support, like scholarships or covering school fees, can make a big difference. Providing food for students and improving school access with better transportation also helps. Another key intervention is improving water and sanitation fa-



❑ Effective interventions to overcome gender barriers in education

❑ Comprehensive, gender-sensitive education interventions needed

❑ Gender inequality in healthcare, limited access for women

❑ Impact of healthcare inequalities, higher mortality for women

cilities in schools, as well as offering materials like books and uniforms. However, there are still many gaps in research, especially on issues like school-related violence, child marriage, and menstrual health. To truly improve the situation, it's important to focus on multiple strategies that work together, like creating safe environments for girls and training teachers to be more gender-sensitive.

For the best results, interventions need to be well-planned and comprehensive. Programs should focus on providing support systems like anti-harassment cells in schools and designing teaching methods that include gender equality. Teacher training is crucial, as it can help reduce biases in the classroom. However, it's not easy to pinpoint which specific actions have the most impact, as many of these interventions are complex and work in different ways. More research is needed to understand how different interventions can lead to better educational outcomes for girls, but it's clear that education plays a key role in empowering girls and promoting gender equality.

iii. Health Inequities

In India, gender inequalities in healthcare remain a major concern, significantly affecting women's health and well-being. Women often face restricted access to medical services due to both economic and cultural barriers. For instance, studies show that only around 45 percent of hospital visits by women are covered by health insurance, and fewer girls are taken to hospitals compared to boys (Kodoth & Eapen, 2005; Sahu, 2020). Deeply rooted patriarchal norms often prioritize men's health over women's, limiting women's autonomy in making healthcare decisions. In many households, women depend on male family members to accompany them to hospitals, leading to delayed treatment and poor health outcomes.

These inequalities have wide-ranging consequences for women's lives. Women in India face higher mortality rates, particularly from preventable causes such as maternal complications during pregnancy and childbirth (Banerjee & Ghosh, 2018). Many illnesses are diagnosed late because women do not receive routine check-ups, and the expectation that women serve primarily as caregivers further discourages them from seeking treatment for themselves (Menon, 2015). This neglect not only undermines women's health but also impacts the economy, as poor health reduces women's ability to contribute productively

to society. Addressing these inequalities requires stronger health-care policies that guarantee equal access to medical treatment for men and women alike (Yadav, 2006).

In Kerala, despite being a highly developed state with good health and education scores, there are still big gender inequalities. For example, fewer women work compared to men, and there are gaps in job opportunities and wages (Fuller, 1996; Kodoth & Eapen, 2005). Women also face specific health challenges, like higher rates of anaemia and more violence against them. Women with different education levels also have different health problems, like high blood pressure for educated women and blood sugar issues for less educated ones. The state struggles with issues like limited political involvement for women, unequal access to resources, and old-fashioned gender roles in welfare programs. These problems show that even in a developed state like Kerala, real gender equality still needs more focused effort, especially in areas like work, health, and politics (Jaffrelot, 2010).

❑ Gender inequality persists in Kerala despite development

iv. Political Underrepresentation

Women around the world face many barriers when it comes to participating in politics. In many countries, deeply rooted cultural beliefs and social norms expect women to focus on family roles instead of pursuing careers in politics. This often leads to women doubting their own abilities and qualifications, making them less likely to run for office. They also face challenges like fewer opportunities to build political connections and resources, and sometimes even face violence, especially online. As a result, women are often underrepresented in government, which means that the government doesn't fully reflect the needs and interests of all its people.

❑ Gender barriers hinder women's political participation

In India, the Women's Reservation Bill was passed in 2023, which will give women a 33% reservation, or quota, in the Lok Sabha (lower house of Parliament) and state legislatures. This means that a third of the seats in these important government bodies will be set aside for women. Right now, women make up only 14% of the members in the Lok Sabha. The new law will take effect after the next census and a process called delimitation, which adjusts the boundaries of electoral areas. This move aims to encourage more women to participate in politics and make sure that their voices are heard in decision-making.

❑ Women's Reservation Bill aims to increase political representation

The bill also includes special provisions for women from underprivileged communities, such as Scheduled Castes and



❑ Women's Reservation Bill ensures inclusion of marginalized women in politics

Scheduled Tribes, by ensuring that their seats are reserved within the women's quota. After each delimitation, the seats reserved for women will be rotated, ensuring that different women get opportunities over time. This law is a big step towards achieving gender equality in India's political system. Countries like Rwanda have already implemented similar laws, and as a result, women now make up more than half of their parliamentary representatives. This shows how gender quotas can have a real impact on women's political participation.(Recap:)

Insight Box: Matrilineal and Women's Power

In Kerala, the Nair Tharavad system was a matrilineal tradition where property and family names passed through women rather than men. This gave women in the Nair community more control over family wealth and property. Women inherited and managed the family estate, holding significant power within the household. While men had important roles outside the home, women were in charge of domestic matters. This unique system gave women more rights and responsibilities compared to many other societies at the time.

❑ Women's Reservation Bill faces challenges, but is a significant step towards inclusivity

While the Women's Reservation Bill is a positive step, there are still challenges. Some groups feel left out, such as women from Other Backward Classes (OBCs), and there is a debate about whether this law will bring true change or just serve as a symbolic gesture. Still, this law represents an important effort to break the cycle of gender exclusion in politics and help create a more inclusive government.

v. Gender Based Violence in India

❑ Gender-based violence in India is widespread and harmful

Gender-based violence (GBV) is a serious problem in India, deeply connected to traditional beliefs that treat women as less important than men. It affects many women in different ways, causing physical and emotional harm. In 2022, there were over 125,000 cases of domestic violence, around 33,000 cases of sexual assault, and 7,000 dowry deaths (National Crime Records Bureau [NCRB], 2022). These acts of violence not only hurt the women directly involved but also affect their families and communities. Women who face violence often struggle with long-term health issues, both physical and mental, and the cost of this violence is high for society.

Several challenges make it harder to fight GBV in India. The

❑ Challenges in fighting GBV in India; need for legal and cultural reforms

legal system has outdated laws that don't always protect women properly, and many police officers don't take complaints seriously. There are not enough shelters or support services for victims, and social pressures make it hard for women to report violence (Sen, 1999). However, there are some positive changes happening. New technologies like mobile apps for emergency help, education programs to promote gender equality, and awareness campaigns are helping more people understand the problem. To truly stop gender-based violence, India needs a broader approach that changes harmful cultural norms and fixes problems in the legal and social systems (Jaffrelot, 2010).

vi. Domestic Violence

❑ Domestic violence in India rooted in cultural, social, and economic factors

Domestic violence in India is a major problem, especially for women, and is rooted in cultural beliefs that treat women as less important than men. It can include physical, emotional, sexual, and economic abuse. Many women face violence at home, with only a small percentage reporting it because of fear and shame (Sen, 1999). The causes of domestic violence are linked to a mix of social, economic, and personal factors. Socially, there are deeply rooted beliefs in male dominance, and culturally, women are often economically dependent on their partners (Jaffrelot, 2010). Other factors like substance abuse, anger issues, and the dowry system contribute to violence as well (NCRB, 2022). The impacts on women are severe, with many experiencing mental health problems like depression, anxiety, and post-traumatic stress disorder. Over time, the trauma can lead to serious issues like eating disorders, substance abuse, and self-harm. Additionally, children who witness domestic violence are more likely to face emotional and psychological challenges as they grow up.

❑ Domestic violence persists in Kerala despite high education levels

In Kerala, despite being a state with high education levels, domestic violence is still a serious issue. Around 10% of married women in Kerala have experienced physical or sexual violence, and many also face emotional abuse (NCRB, 2022). Factors like alcohol use are strongly linked to violence, with nearly 20% of women facing abuse when their husbands drink. Financial problems, alcohol abuse, jealousy, and dowry disputes are common causes of domestic violence in the state (Sen, 1999). The police in Kerala have reported over 11,000 crimes against women, with a significant number of cases involving cruelty by husbands (NCRB, 2022). This shows that even in a socially advanced state, domestic violence remains a major problem, with many cases still not reported.



vii. Dowry System

The dowry system in India involves giving money, property, or goods from the bride's family to the groom's family during marriage. It was originally intended to help women financially, but over time, it has become a practice that leads to exploitation and violence, with many families demanding large sums (Banerjee & Ghosh, 2018; Jaffrelot, 2010). The Dowry Prohibition Act of 1961 makes giving or taking dowry illegal, with punishments like imprisonment and fines. Despite this, the dowry system remains widespread, particularly in northern India and among wealthier families. In 2022, India recorded 7,060 dowry deaths and 8,207 dowry-related cases, highlighting the ongoing prevalence of dowry-related violence (NCRB, 2022). Although the number of cases has slightly decreased, dowry continues to be deeply rooted in certain parts of Indian society.

❑ Dowry system persists, causing exploitation and violence

In 2022, India reported 6,450 dowry deaths, indicating that this harmful practice is still a major problem (NCRB, 2022). On average, 20 women die every day due to dowry-related violence. Uttar Pradesh recorded the highest number of deaths with 2,218 cases, followed by Bihar with 1,057 and Madhya Pradesh with 518. Southern states reported fewer deaths, including Karnataka (167), Telangana (137), Tamil Nadu (29), and Kerala (11). Despite these alarming figures, 359 dowry death cases were closed due to lack of evidence, highlighting the challenges in holding perpetrators accountable.

❑ Dowry deaths remain high, with challenges in justice

In Kerala, even though the state is known for its high education levels, the dowry system persists and continues to cause serious problems. Over the past 12 years, there have been 192 dowry-related deaths, and since 2010, 1,096 cases of dowry harassment were reported (NCRB, 2022). Southern districts like Thiruvananthapuram and urban areas like Ernakulam report more cases than rural districts such as Wayanad. Factors sustaining dowry include the weakening of the old matrilineal system, the influence of remittances from Gulf countries, and growing consumerism (Fuller, 1996; Kodoth & Eapen, 2005). Despite Kerala's progress in education and development, many families continue to be financially strained by dowry demands, showing that this harmful practice remains deeply embedded in society.

❑ Dowry remains persistent in Kerala, despite education

viii. Sexual Assault

Sexual assault is a serious crime where someone forces or pressures another person into unwanted sexual contact without

❑ Sexual assault involves non-consensual sexual acts, causing emotional harm

❑ Sexual assault is widespread in India, with low reporting and conviction rates

❑ Rising sexual assault cases in Kerala, especially child abuse, need urgent action

their permission. It can include actions like attempted rape, unwanted touching, or forcing someone to perform sexual acts. Most of the time, the person who commits sexual assault is someone the victim knows, like a friend or family member. This can cause a lot of emotional harm, like anxiety, depression, and trust issues. It's important to remember that the victim is never to blame for what happens.

Sexual assault is a significant problem in India, with thousands of cases reported every year. In 2022, India reported 30,948 cases of rape, indicating that a rape occurred approximately every 17 minutes (National Crime Records Bureau [NCRB], 2022). States such as Rajasthan and Chandigarh report the highest rates, while Nagaland and Tamil Nadu have lower rates. Many cases go unreported due to fear of retaliation, social stigma, or lack of trust in the police. Even when reported, the conviction rate is low, around 27-28%. Women from marginalized communities, including Dalits and Adivasis, face additional barriers to justice. Experts suggest that sexual violence is becoming normalized in certain contexts, highlighting the need for significant legal reforms and social awareness campaigns (Banerjee & Ghosh, 2018; Jaffrelot, 2010).

Kerala faces a growing crisis of sexual assault, particularly regarding child sexual abuse. In 2023, 4,663 cases were reported under the POCSO Act, with nearly half of the victims aged 15-18 and almost 40% between 10-14 years old. Girls are disproportionately affected, and incidents occur in children's homes, public spaces, and schools. The perpetrators are often people known to the victims, such as coaches or classmates. The Kerala State Commission for Protection of Child Rights has emphasized the urgent need for awareness programs, preventive strategies, and stronger reporting mechanisms. These challenges are compounded by persistent gender exclusion and cultural attitudes that continue to undermine justice and prevention efforts (Fuller, 1996; Kodoth & Eapen, 2005).

In conclusion, caste and gender dimensions of social exclusion in India continue to influence various aspects of life, from education and employment to politics and personal freedoms. Despite legal safeguards and progressive movements, deep-rooted social structures maintain these hierarchies. Addressing these inequalities requires not only policy-level changes but also shifts in societal attitudes. Through education, activism, and inclusive governance, India can move towards a more equitable society where caste and gender no longer determine one's opportunities and rights.



Summarised Overview

In this chapter we explored the intersection of caste and gender in India, focusing on the historical origins of the caste system and its role in social stratification. It examines how concepts of purity and pollution have reinforced caste-based discrimination, creating social barriers, especially for Dalits. And the severe forms of exclusion Dalits face, such as untouchability and unseeability, and the added layer of gender-based discrimination they encounter in areas like politics, the economy, education, and healthcare. It also addresses the harmful impact of caste-based marriage norms and the specific violence Dalit women endure. Using theoretical frameworks like Sanskritization, dominant caste theory, and Ambedkar's subaltern approach, the chapter critically analyzes the forces that perpetuate caste and gender oppression. It also examines government interventions aimed at addressing these inequalities and emphasizes the ongoing struggle for equality and justice, calling for continued efforts to dismantle oppressive systems and build a more inclusive society.

Self-Assessment Questions

1. What are the main castes in the traditional Hindu caste system?
2. How does caste determine access to education and employment in India?
3. What is the significance of Sanskritization in social mobility?
4. How does gender discrimination manifest in education and healthcare?
5. What legal provisions exist to combat untouchability and caste-based violence?
6. Why is inter-caste marriage discouraged in traditional Indian society?
7. How do economic disparities reinforce gender inequality?
8. What are some modern challenges Dalit women face in India?
9. How does political underrepresentation affect women's rights in India?
10. What is the role of the dominant caste in rural India?

Assignments

1. Explain the historical evolution of the caste system in India.
2. How do the concepts of purity and pollution reinforce caste discrimination?

3. Discuss the impact of untouchability in contemporary India despite legal abolition.
4. Analyze the role of caste in economic stratification and labor division.
5. How does caste endogamy contribute to sustaining caste hierarchy?
6. Explain the relationship between caste-based exclusion and honour killings.
7. Evaluate the impact of gender-based exclusion in Indian politics and governance.
8. Discuss the economic barriers faced by women due to gender discrimination.
9. Compare and contrast the perspectives of Gandhi and Ambedkar on caste reform.
10. How have government policies attempted to address caste and gender discrimination?

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU



UNIT 3

Religion and Socio-Spatial Dynamics

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ comprehend the historical and contemporary factors contributing to religious exclusion in India
- ▶ analyze the impact of religious-based violence and communalism on society
- ▶ define socio-spatial dynamics and how social structures and space interact
- ▶ explore socio-spatial segregation and its consequences for marginalized religious groups
- ▶ propose policies for inclusivity and resource equity

Background

Religion and space are like pieces of a big puzzle, shaping where people live, how they interact, and how they share resources. Walk through Old Delhi, and you'll notice something striking—bustling markets, grand mosques, and ancient temples standing side by side. Yet, beneath this coexistence, invisible lines divide communities. In Mumbai, towering high-rises overlook crowded religious ghettos, silently marking who belongs where. These divisions didn't appear overnight. History carved them into the city's landscape—colonial rulers used divide-and-rule tactics, the Partition of India deepened religious rifts, and urban planning reinforced separation rather than unity.

For many religious minorities, exclusion is a daily reality. A Muslim family might struggle to rent a home in a 'Hindu area,' while Dalit Christians face rejection from both caste-structured Hindu society and mainstream Christian institutions. These barriers aren't always visible, but they are deeply felt. As the saying goes, "A fence should protect the crop, not eat it," yet the very systems meant to uphold fairness often contribute to division. Religious violence—like the Gujarat riots of 2002 or the Delhi riots of 2020—

leaves scars that push communities into fear-driven segregation. Seeking safety, people retreat into their own religious enclaves, reinforcing separation even further.

The result? Entire neighbourhoods left struggling with poor schools, limited job opportunities, and crumbling infrastructure. These invisible walls don't just divide people—they deepen inequality. But to break them down, we first need to understand how they were built. This chapter will explore how history, economics, and politics shape religious exclusion and, more importantly, how we can create cities that embrace diversity rather than fear it.

Keywords

Religion, socio-spatial dynamics, segregation, religious exclusion, Communalism, Secularism

Discussion

The intersection of religion and socio-spatial dynamics in India presents a layered reality where religious identity significantly influences spatial organization, social interactions, and access to resources. Religious affiliation is deeply embedded in the country's historical, political, and economic fabric, shaping both inclusion and exclusion within various communities. While religion fosters cultural cohesion and a shared sense of belonging, it also serves as a basis for marginalization, exclusion, and conflict, manifesting in spatial segregation and systemic inequalities.

Religious identity impacts spatial arrangements, contributing to the creation of religious enclaves, ghettoization, and differential access to opportunities. It examines the historical roots of religious exclusion, including colonial-era policies, the impact of Partition, and contemporary socio-political factors that reinforce segregation and discrimination. It delves into the role of legal and political structures in shaping religious-based exclusions and the consequences of communalism in Indian society.



2.3.1 Religion

Religion is an important part of many people's lives, shaping how they think, act, and connect with others. It provides frameworks for understanding life's larger questions, such as the purpose of existence and what happens after death. Religion also offers emotional strength in times of hardship by giving people hope and comfort (Madan, 1992; Kumar & Rijesh, 2017). When individuals share the same religious beliefs and traditions, it fosters unity and a sense of belonging within communities (Rao, 2004). Moreover, religion provides moral guidance, helping people distinguish between right and wrong and encouraging ethical choices (Turner, 2013). However, religion can also become a source of conflict, leading to exclusion, unfair treatment, or tensions between groups with differing beliefs (Shani, 2008; Engineer, 1984; Ahuja, 1992). Understanding both the positive and negative aspects of religion is therefore essential to grasp its impact on people's lives and on society more broadly.

□ Impact of religion

2.3.1.1 Religion as a Factor in Social Exclusion

Religion plays a complicated role in society—it can bring people together but also push certain groups away. Religious minorities often face exclusion because of their beliefs, traditions, or cultural differences. Some religious practices also reinforce traditional power structures, making it harder for certain groups to be treated equally. In many societies, religion can create psychological barriers, where people from different religious backgrounds may feel separated or distrustful of each other.

□ Religion and exclusion

Interestingly, while religion can sometimes lead to exclusion, it can also provide comfort to those who feel marginalized. Research shows that when individuals experience social rejection, they often turn to religion for emotional strength and belonging, as faith can act as a psychological shield against loneliness (Kumar & Rijesh, 2017; Madan, 1992). In this way, religion plays a dual role, contributing to both exclusion and resilience. However, not all thinkers viewed this positively. Karl Marx had a critical perspective, arguing that religion encouraged the poor and oppressed to accept their struggles rather than challenge unjust systems. He famously described religion as the “opiate of the masses,” suggesting that it functioned like a drug that pacified people and discouraged resistance to

□ Religion's dual role

inequality (Rao, 2004; Turner, 2013). This highlights how religion can simultaneously act as a source of comfort and a tool of social control.

India's Religious Diversity

Did you know that India is home to a massive diversity of religious communities? Even though Hindus make up the majority, India has one of the largest populations of Muslims, Sikhs, Christians, and other religious minorities in the world! It's a place where different faiths have coexisted for centuries, shaping the country's rich and colorful cultural tapestry. Pretty amazing, right?

Religion's role in social exclusion is complicated. It can divide people based on culture, power, and belief systems, yet it also provides emotional strength to those facing discrimination. Understanding this dual role helps us see how religion can shape both unity and exclusion in society.

2.3.1.2 Historical Context of Religious Exclusion in India

Religious exclusion in India has deep historical roots, beginning during British colonial rule. The British used a "divide-and-rule" strategy, which played on existing religious differences between Hindus and Muslims (Rao, 2004; Shani, 2008). This helped them maintain control over India but also planted seeds for future divisions. After India gained independence in 1947, the country was split into India and Pakistan, based on religion, which led to massive violence and the displacement of millions of people (Engineer, 1984; Madan, 1992). This traumatic event still affects how different religious groups interact with each other in India today.

After independence, India created a Constitution that promised equality and protection for all religions (Kumar & Rijesh, 2017). However, despite the country's commitment to secularism, religious differences have continued to be used for political gain (Turner, 2013; Ahuja, 1992). Some political parties have manipulated religious feelings to win votes, which has often resulted in the marginalization of minority groups, particularly Muslims (Shani, 2008; Oza, 2020). These political moves have contributed to an ongoing sense of exclusion for many religious

❑ Political manipulation of religion leads to minority exclusion



minorities, making it harder for them to fully participate in society.

❑ Laws and discrimination exacerbate religious minority exclusion

In recent years, laws and policies have further intensified these issues. Anti-conversion laws, which limit religious conversions, have been introduced in several states, often targeting minority religions like Islam and Christianity (Konikkara, 2022; New Indian Express, 2022). There are also reports of discrimination against Muslims, Christians, Sikhs, and Dalits in areas like education and jobs (Oza, 2020; Sharma & Banerjee, 2020). While India's Constitution forbids discrimination, the laws are not always enforced, and many religious minorities still face exclusion and violence (Madan, 1992; Kumar & Rijesh, 2017). These historical and contemporary factors create a complex situation that continues to shape how different religious groups live together in India.

❑ The Partition divided India, causing violence and displacement

i. Partition of India and its impact on religious minorities

The Partition of India in 1947 was a major event that divided the country into India and Pakistan, based mainly on religious differences. The British had controlled India for many years and, before leaving, they created boundaries that split Hindus and Muslims into separate countries (Rao, 2004; Shani, 2008). This caused a lot of violence, with many people losing their lives and millions of people having to leave their homes to move to a new country (Engineer, 1984; Madan, 1992). Hindus and Sikhs moved from Pakistan to India, while Muslims moved the other way. This huge movement of people and the violence that came with it left deep scars on both countries.

❑ Partition led to reduced religious minorities and lasting discrimination

After the partition, the number of religious minorities, like Muslims in India and Hindus in Pakistan, decreased dramatically. In India, Muslims used to be about a quarter of the population, but after the partition, their numbers shrank. In Pakistan, Hindus became a very small group, often facing discrimination and fear (Kumar & Rijesh, 2017; Ahuja, 1992). Over time, in both countries, religious minorities struggled with being treated unfairly. In India, for example, Muslims have faced social exclusion and political challenges (Oza, 2020; Turner, 2013). Meanwhile, in Pakistan, Hindus have had their cultural identity threatened and dealt with legal issues (Madan, 1992; Shani, 2008). These events have had long-lasting effects, and the impact of the partition still affects the way religious communities live and interact today in both countries.

ii. Colonial policies and the politicization of religion.

During British colonial rule in India, the British used a strategy called "divide and rule" to deepen tensions between different religious groups, particularly Hindus and Muslims. By dividing people based on their religion and treating them differently, they fostered suspicion and rivalry (Kumar & Rijesh, 2017; Rao, 2004). This approach not only exacerbated existing religious divides but also turned religion into a tool for political power. The British introduced policies of religious tolerance, but they were often inconsistent and unfair. While criticizing certain Hindu practices like sati (widow-burning), the British restructured Indian religious traditions according to their own beliefs, which resulted in the emergence of a unified Hindu identity (Madan, 1992). Additionally, the British censuses categorized people by religion, creating rigid identities that overlooked the complex diversity of Indian religious life (Turner, 2013).

❑ British colonial impact on religion

These colonial policies contributed to long-lasting problems in Hindu-Muslim relations. Many Muslims felt marginalized, believing the British favoured Hindus in areas like education and government jobs, which worsened tensions (Engineer, 1984; Shani, 2008). This division eventually contributed to violence and unrest, particularly during India's independence and the partition in 1947. The British politicization of religion set the stage for future conflicts, with political groups continuing to use religion to garner support, often at the expense of minority communities (Ahuja, 1992; Oza, 2020). The legacy of British colonialism continues to shape India's societal and political landscape today, showing the lasting impact of colonial rule on the role of religion in India's public life.

❑ Colonial legacy in Hindu-Muslim tensions

2.3.1.3 Religion and Social Exclusion in India

Religion plays a significant role in social exclusion in India, particularly when combined with the caste system. Many marginalized communities, such as Muslims and Dalits, face discrimination based on their religion or caste, which affects their access to opportunities and basic rights (Kumar & Rijesh, 2017; Rao, 2004). The caste system, deeply intertwined with Hindu traditions, enforces a rigid social hierarchy where lower-caste groups, especially Dalits, are subject to exclusion in public spaces and services (Madan, 1992; Ahuja, 1992). Muslims also face similar challenges, including limited access to education, jobs, and housing, often living in segregated areas due

❑ Religion and caste exclusion



to discrimination and fear of violence (Shani, 2008; Engineer, 1984). The Sachar Committee findings further highlighted that Muslims share many struggles similar to Scheduled Castes (SCs) and Scheduled Tribes (STs) in India (Oza, 2020).

Despite the Indian Constitution guaranteeing equality, marginalized groups continue to experience exclusion in various forms. Economically, Muslims are more likely to live in poverty and face fewer job opportunities, while Dalits and Muslims often encounter discrimination in workplaces and everyday life (Kumar & Rijesh, 2017; Ahuja, 1992). Socially, cultural separation persists, with religious and caste groups often living apart from one another (Knott, 2005; Soja, 2010). Although the government has introduced policies to reduce discrimination, these efforts have not been fully effective, and exclusion continues to be reinforced through political and social practices (Shani, 2008; Sharma & Banerjee, 2020). To build a more equitable society, India must ensure stronger implementation of laws, better access to education and employment, and sustained legal protection for marginalized groups (Turner, 2013; Oza, 2020).

❑ Ongoing exclusion despite legal equality

i. How do different religions cope with social exclusion

Religion plays a significant role in helping individuals cope with social exclusion by providing emotional support, a sense of belonging, and resilience. Studies show that people who face exclusion often strengthen their religious beliefs and practices. Across various faiths, individuals turn to prayer, religious gatherings, and scripture for comfort. Religion acts as a buffer against stress, reducing negative emotions and offering psychological stability during difficult times. In Christianity, for example, churches provide strong community support, allowing individuals to connect with others and receive emotional backing. Prayer and reflection help Christians cope with isolation and reinforce their faith.

❑ Religion aids coping with exclusion

Similarly, Muslims rely on religious practices such as Salah (prayer) and Quran recitation to reinforce their identity and find strength during challenging times. The concept of the Ummah, or global Muslim community, fosters solidarity and makes excluded individuals feel less isolated. Studies on refugees, particularly displaced women, show that religious coping mechanisms help them navigate violence and displacement, offering hope and resilience in the face of hardship.

❑ Religious practices foster solidarity and resilience

❑ Religion aids in coping with exclusion and promoting inclusivity

Religious coping mechanisms play a crucial role in supporting individuals facing social exclusion. Whether through personal reflection, prayer, or collective support, religion helps people navigate social challenges while strengthening their identity and emotional well-being. Understanding these mechanisms can guide efforts to create better interventions to support marginalized communities and promote inclusivity.

❑ Discrimination against religious minorities in India affects opportunities

ii. Experiences of marginalized religious communities.

In India, some religious groups, like Muslims, Christians, Dalits, and Sikhs, face a lot of challenges because of discrimination and violence. Many of these groups struggle to get good jobs or education. They often face unfair treatment just because of their religion. For example, they might not be able to live in certain areas or get the same healthcare and public services as others. This makes their lives harder and keeps them from having the same opportunities as others in society.

❑ Rising violence and unpunished attacks on religious minorities in India

There have also been violent attacks against religious minorities, especially Muslims and Christians. Notable examples include the Gujarat riots and the Kandhamal violence, where communities were subjected to severe harm and displacement (Shani, 2008; Engineer, 1984). In recent years, rising Hindu nationalism has further intensified such violence, with many attacks going unpunished, leaving minority communities feeling unsafe in their own neighbourhoods (Ahuja, 1992; Oza, 2020).

❑ Anti-conversion laws and dual discrimination worsen challenges for religious minorities

Laws designed to protect religious freedom, such as anti-conversion laws, have sometimes been used against minorities instead of protecting them. These laws often enable false accusations against individuals who practice or convert to minority faiths, thereby worsening exclusion (Marcovitz, 2010; Turner, 2013). For Dalits who also belong to Christian or Muslim communities, the situation is especially severe, as they face both caste-based and religious discrimination, which further limits their access to justice and welfare (Kumar & Rijesh, 2017; Madan, 1992).

Despite all these problems, many people from these communities are still fighting for their rights. They are organizing in local groups to help their communities, and some are working hard to make sure that people from all religions are treated



equally. There is a strong hope that by working together, these groups can change the laws and society to make sure that everyone can live safely and with the same chances for a better life.

2.3.1.4 Communalism and Religious-Based Violence in India

❑ Communalism rooted in colonialism

Communalism in India is an ideology that prioritizes the interests and identity of specific religious groups, leading to societal divisions and conflicts. The roots of communalism are deeply tied to colonial policies, especially the British "divide and rule" strategy. The British institutionalized communal identities through separate electorates and administrative decisions, like the Partition of Bengal in 1905, which laid the groundwork for tensions that persist today. This policy of dividing communities for political gain has influenced India's modern social and political landscape, contributing to ongoing divisions along religious lines.

❑ Partition of Bengal fueled religious divides

The Partition of Bengal in 1905 was a pivotal event that reinforced religious divides by creating separate Muslim-majority and Hindu-majority provinces. While the British justified the move for administrative efficiency, it was seen as an effort to weaken the nationalist movement by fostering communal discord (Rao, 2004). This division played a crucial role in the formation of the All-India Muslim League in 1906, which later advocated for the creation of Pakistan, culminating in the Partition of India in 1947. The economic competition for resources and jobs during colonial rule also heightened religious tensions, as communal organizations like the Hindu Mahasabha and Muslim League rallied people around religious identities (Engineer, 1984).

❑ Post-independence communalism and violence

Post-independence, communalism continued to shape India's political and social realities. The trauma of Partition left deep scars, fostering animosities between religious communities. Political parties have at times exploited communal sentiments for electoral gain, leading to outbreaks of communal violence, such as the 2002 Gujarat riots and the 2020 Delhi riots (Shani, 2008; Engineer, 1984). Socio-economic disparities also fuel communal grievances, with marginalized communities, particularly Muslims and Dalits, facing discrimination in education, employment, and access to resources (Oza, 2020; Sharma & Banerjee, 2020).

To address communalism in India, a comprehensive approach is needed. This includes promoting interfaith dialogue, creating inclusive policies, and addressing socio-economic inequalities. Strengthening community bonds, advocating for minority rights, and countering the political exploitation of religion are essential steps toward reducing communal tensions. Understanding the historical and socio-political roots of communalism is crucial for fostering a more cohesive and inclusive society.

i. Mob lynching in India

Mob lynching in India is an alarming and growing issue, where groups of people violently attack others, often due to religious or social practices. In recent years, there has been a rise in such incidents, particularly targeting Muslims, often linked to accusations of cow slaughter (Shani, 2008; Engineer, 1984). Cows are considered sacred in Hinduism, and vigilante groups, believing they are protecting Hindu values, take matters into their own hands, leading to violent confrontations (Madan, 1992). One such example is the lynching of Prakash Lakda, a Christian tribal man, in 2019 in Jharkhand over suspicion of cow slaughter (The Wire, 2019). Similarly, in 2024, two Muslim men were lynched in Chhattisgarh on allegations of cattle smuggling, highlighting the troubling rise in anti-Muslim violence (Al Jazeera, 2024).

Rise in mob lynching

The increase in mob lynchings is closely tied to the political climate in India, where the promotion of Hindu nationalism by the ruling government has intensified these tensions (Shani, 2008; Oza, 2020). Critics argue that the government's failure to stop or even condemn these attacks has emboldened vigilante groups, making it difficult for religious minorities to feel safe (Engineer, 1984; Ahuja, 1992). Despite laws protecting all citizens, the police and legal systems often fail to take strong action against those responsible for these lynchings (Kumar & Rijesh, 2017; Rao, 2004). To address this issue, a concerted effort from the government, the legal system, and society is necessary to ensure that religious minorities, especially Muslims, are treated fairly and protected from such violence (Soja, 2010; Knott, 2005).

Political climate fueling mob lynchings



ii. Issues of Islamophobia

❑ Islamophobia's global impact

Islamophobia, or the fear and hatred of Muslims, is a widespread issue affecting various parts of the world, including Europe, the United States, and India. In Europe, it manifests in physical and verbal attacks on Muslims, particularly women who wear hijabs, as well as discriminatory laws that restrict religious practices, such as banning religious symbols or making it harder to build mosques (Turner, 2013; Marcovitz, 2010). The media often exacerbates these issues by spreading negative stereotypes about Muslims, fueling more discrimination (Shani, 2008). In the United States, following the 9/11 attacks, Muslims faced increased police profiling and a rise in hate crimes (Rao, 2004; Kumar & Rijesh, 2017). Politicians sometimes exploit fear of Muslims to gain votes, further escalating the problem (Oza, 2020).

❑ Islamophobia's rise in India

In India, Islamophobia has intensified, particularly with the rise of Hindu nationalism (Shani, 2008; Engineer, 1984). Discriminatory laws like the Citizenship Amendment Act, which excludes Muslims from certain benefits, have added to the challenges Muslims face (Kumar & Rijesh, 2017; Madan, 1992). Violence, such as mob attacks and harassment, has become more prevalent, with the police often failing to take appropriate action (Konikkara, 2022; The Wire, 2019; Al Jazeera, 2024). The media in India, including Bollywood films, sometimes perpetuates negative portrayals of Muslims, contributing to societal hostility (Sharma & Banerjee, 2020; Oza, 2020). The consequences of Islamophobia are not only physical but also deeply emotional, as many Muslims live in constant fear, leading to isolation and anxiety. This issue also affects other groups, such as Sikhs and Arabs, who are wrongly perceived as Muslims (Rao, 2004; Turner, 2013).

The impact of Islamophobia extends beyond individuals, harming entire communities. To combat it, efforts must be made to improve laws, media representation, and inter-community understanding. Everyone deserves respect, regardless of their religion or background, and addressing Islamophobia is crucial for creating a more inclusive and just society.

iii. Christian persecution in India

Christian persecution in India has been on the rise, particularly due to the growth of Hindu nationalism and the ideology of Hindutva, which emphasizes India as a nation for Hin-

❑ Hindu nationalism fuels Christian persecution

❑ Election periods exacerbate Christian persecution

❑ Kandhamal violence, persecution

❑ Kandhamal aftermath, injustice, religious minority challenges

dus (Shani, 2008; Oza, 2020). This has created an environment where religious minorities, including Christians, face increased violence, harassment, and legal trouble (Konikkara, 2022; New Indian Express, 2022). Over 580 incidents of Christian persecution were reported in 2024 alone, with converts from Hinduism to Christianity often suffering physical violence, social exclusion, and false accusations of forced conversions (Mitchell & Mitchell, 2024; Shani, 2008). Anti-conversion laws in some states have been misused to target Christians, making it difficult for them to practice their faith without fear of arrest or legal consequences (Madan, 1992; Kumar & Rijesh, 2017).

The situation worsens during election periods, as political parties sometimes exploit religious issues to gain votes, leading to further violence and discrimination against Christians. Many Christians, especially in rural areas, face social isolation, losing access to community resources, jobs, and support due to their faith, which often results in violent attacks. This persecution is driven by a combination of political, social, and legal factors, making it essential for India to foster greater tolerance and ensure the safety of all its citizens, regardless of their religion.

iv. The Kandhamal violence

The Kandhamal violence in 2008 was one of the most brutal acts of religious persecution in recent Indian history (National People's Tribunal, 2008), triggered by the assassination of Hindu nationalist leader Swami Lakshmanananda Saraswati. Although Maoist insurgents claimed responsibility, Hindu nationalist groups blamed local Christians, leading to widespread violence. Over the course of several months, nearly 100 Christians were killed, more than 6,000 homes were looted or burned, and 56,000 people were displaced. The violence included extreme acts such as burning or burying Christians alive and forced conversions to Hinduism. More than 300 churches and numerous Christian institutions were destroyed in this attack on Christianity. (National People's Tribunal, 2008).

The aftermath of the violence left a deep and lasting impact on the Christian community in Odisha, with many victims failing to receive justice or protection. Despite international condemnation, the region remains tense and fearful of further attacks. The Vatican has recognized 35 individuals from the region as martyrs, honouring their sacrifices. This tragedy shows the ongoing challenges faced by religious minorities in India and underscores the need for greater advocacy and protection for vulnerable communities.



v. Violence in Manipur

Displacement crisis

As of early 2025, the violence in Manipur has wrought deep suffering, particularly among Christian communities, most notably the Kuki-Zo tribes. Since ethnic clashes broke out in May 2023 between the predominantly Christian Kuki and largely Hindu Meitei groups, around 60,000 people have been displaced. Many families continue to live in relief camps or nearby states, where conditions are marked by shortages of food, shelter, and medical access. The crisis is further aggravated by poor sanitation and limited hospital facilities, making life extremely precarious for those uprooted (Human Rights Watch, 2025; The New Humanitarian, 2023).

Wholly destruction

The violence has also taken a severe toll on religious and cultural sites. A Supreme Court-appointed committee confirmed that 386 religious structures were vandalised through arson, including 254 churches and 132 temples. The committee has instructed the state government to identify, document, and secure all damaged places of worship, underscoring the scale of destruction and the urgent need for protective measures (Indian Express, 2023; The Wire, 2023).

Pseudo-Secularism in India

In India, secularism means that the State should treat all religions equally and not give special preference to any one community. However, the term pseudo-secularism is often used in public debates to describe situations where leaders claim to be secular but appear to favour one religion for political gain, such as during elections. This practice can create mistrust among communities and weaken the real spirit of secularism, which is about fairness, inclusion, and respect for diversity.

Ongoing violence

Despite official measures and peace appeals, the conflict has not eased. Displacement remains widespread, and reports of renewed clashes, destruction of homes, and targeted violence continue to surface. Relief initiatives have been launched, but they fall short of meeting the needs of those affected. Many communities remain trapped in insecurity, awaiting not only humanitarian support but also long-term efforts at reconciliation, peacebuilding, and justice (Human Rights Watch, 2025).

vi. Religious Fundamentalism in India

Religious fundamentalism in India, particularly the ideology of a "Hindu nation," has significantly influenced the country's politics and society (Shani, 2008; Marcovitz, 2010). This belief promotes the idea that India should be primarily for Hindus, leading to the marginalization of religious minorities, especially Muslims (Madan, 1992; Turner, 2013). The roots of this ideology trace back to the British colonial era, with ideas about a Hindu-centered national identity becoming more prominent in the 20th century (Kumar & Rijesh, 2017; Rao, 2004). Events like the demolition of the Babri Masjid in 1992 underline the violent consequences of this ideology, deepening communal tensions and mistrust between religious communities (Shani, 2008; Engineer, 1984). The rise of religious fundamentalism challenges India's secular traditions and raises concerns about the future of pluralism and equal treatment for all citizens (Oza, 2020; Soja, 2010).

❑ Hindu nationalism undermines democracy and social harmony

The rise of Hindu nationalism and its focus on religious identity has intensified divisions within Indian society, particularly for Muslims and other minorities who often feel excluded or unfairly treated (Sharma & Banerjee, 2020; Mitchell & Mitchell, 2024). Critics argue that this shift undermines India's democratic values, where all religions should be treated equally (Turner, 2013; Knott, 2005). This growing influence of religious politics is seen as a threat to the country's secular framework and raises serious questions about fairness, social harmony, and equal treatment for all communities, regardless of their religion (Shani, 2008; Ahuja, 1992). As religious fundamentalism gains strength, there is increasing concern that it could marginalize the diversity that India is known for (Madan, 1992; Oza, 2020).

❑ Forced reconversions highlight religious persecution and intolerance

A troubling consequence of religious fundamentalism in India is the rise of forced reconversions, particularly among marginalized communities like Dalits and Christians. Hindu nationalist groups orchestrate these "ghar wapsi" efforts, pressuring individuals to revert to Hinduism, regardless of their personal beliefs. This practice is supported by anti-conversion laws in some states, which complicate efforts to challenge such actions legally (Kumar & Rijesh, 2017; Rao, 2004). Forced reconversions often result in violence, threats, and ostracization for those who resist, and religious leaders and communities live under constant fear of legal and social repercussions. The practice reflects a broader pattern of religious persecution, underscoring the urgent need for advocacy to protect religious freedom and ensure dignity for all individuals, irrespective of their faith (Oza, 2020; Shani, 2008).



2.3.1.5 Legal and Political Dimensions of Religious Exclusion

The legal and political aspects of religious exclusion in India focus on how laws and political actions affect religious minorities. While the Indian Constitution promises equality and freedom of religion, some laws and political decisions can treat certain religions unfairly. For example, anti-conversion laws can be seen as targeting minorities like Muslims and Christians. Political leaders sometimes use religion to gain support, which can increase divisions between communities. These legal and political issues are key to understanding the challenges that religious minorities face in India and the need for changes to promote fairness and equality.

i. Anti-conversion laws and their impact

Anti-conversion laws in India are regulations designed to control or prevent people from changing their religion (Shani, 2008; Marcovitz, 2010). These laws exist in several states, such as Uttar Pradesh, Gujarat, and Madhya Pradesh, and aim to stop forced, fraudulent, or incentivized conversions (Kumar & Rijesh, 2017; Rao, 2004). To convert to a different religion, individuals usually need to seek permission from the government, and local authorities must be notified beforehand (Oza, 2020; Soja, 2010). While the laws are intended to prevent coercion during conversions, some argue that they are used to target specific religious communities, particularly minority groups, and can exacerbate religious divisions.

Critics of anti-conversion laws contend that they violate the Indian Constitution, which guarantees the right to freely practice any religion (Turner, 2013; Madan, 1992). They argue that these laws discriminate against religious minorities, especially in politically sensitive contexts where Hindu nationalism is a dominant force (Shani, 2008; Engineer, 1984). In some cases, the laws have led to public objections and social tensions, as people are forced to notify authorities about their religious choices (Sharma & Banerjee, 2020; Mitchell & Mitchell, 2024). Critics fear that these laws prioritize Hinduism over other religions and can be used as political tools to influence religious dynamics in the country (Ahuja, 1992; Oza, 2020).

Despite these concerns, the Supreme Court of India has upheld the constitutionality of anti-conversion laws, provided

❑ Anti-conversion laws' impact

❑ Criticism of anti-conversion laws

❑ Debate over anti-conversion laws

they do not infringe upon an individual's right to freely practice their religion. However, there have been instances of these laws being misused, leading to legal challenges and public debate. The controversy centers on whether the laws successfully prevent forced conversions or whether they restrict religious freedom and contribute to religious intolerance. The ongoing debate continues, as some believe the laws harm religious minorities, while others see them as essential for protecting individuals from coercion.

ii. Secularism in India: Constitutional provisions and challenges.

❑ Secularism and challenges in India

Secularism is a main principle in India's Constitution, ensuring that the government treats all religions equally and doesn't favor any one faith. This is supported by various articles, like Article 14, which promises equality, and Article 25, which protects the right to practice any religion. The Supreme Court has emphasized that secularism is so crucial to India's values that it cannot be changed. However, challenges remain, such as political groups that promote one religion over others, leading to communal tensions and violence. Additionally, some laws, like anti-conversion laws, are misused to target religious minorities, and discrimination based on caste and religion still affects many people in India.

❑ Secularism's importance and challenges in practice

Despite these challenges, secularism continues to be a central part of the country's legal framework, and many efforts are made to ensure equal treatment for all. The Constitution provides a solid foundation for equality, but the real test lies in ensuring these ideals are upheld in everyday life, fostering a society where people of all religions can coexist peacefully and with respect.

2.3.2 Socio Spatial Dynamics

❑ Society, space, and inequalities

Socio-spatial dynamics explore how society and space influence each other, shaping how people live, work, and socialize (Soja, 2010; Knott, 2005). The layout of cities, for example, often divides people by wealth, with wealthier individuals living in more developed areas and poorer communities in slums or less-accessible neighborhoods (Sharma & Banerjee, 2020). This division affects opportunities for residents, including access to healthcare, education, and social services. As cit-



ies grow, rapid urbanization and rural-to-urban migration can result in informal settlements or slums, which further impact the social structure and the overall city layout (Soja, 2010). Gentrification, where wealthier individuals move into poorer neighbourhoods, can also change the community dynamic, displacing original residents due to rising costs (Sharma & Banerjee, 2020).

Socio-spatial dynamics also involve environmental justice, as marginalized communities—often poorer or from minority groups—tend to live in areas with higher pollution or environmental hazards (Soja, 2010). This raises concerns about fairness and equal access to a healthy living environment. A person's sense of identity is closely tied to the space they inhabit, with historic neighborhoods or unique areas often contributing to a strong sense of belonging (Knott, 2005). The rise of digital spaces has further transformed socio-spatial dynamics, breaking traditional physical boundaries and creating online communities where interactions no longer rely on physical proximity (Sharma & Banerjee, 2020). This shift shows that the relationship between society and space is continually evolving, influenced by technological advancements. Understanding these dynamics is essential for urban planners and policymakers aiming to create more equitable and inclusive cities.

❑ Environmental justice, identity, digital shift

2.3.2.1 Socio-Spatial Dynamics and Religious Exclusion in India

In India, socio-spatial dynamics reveal that many Muslim communities experience religious exclusion, living in separate areas that limit their access to housing, education, and employment opportunities. A notable example is the Jamia Nagar area in Delhi, which, shaped by past communal violence, has become a predominantly Muslim neighbourhood, often referred to as a "Muslim ghetto" (Mitchell & Mitchell, 2024). Over time, this area has become isolated from the rest of the city, restricting the residents' chances for economic and social advancement.

❑ Muslim community exclusion

Housing discrimination plays a major role in this exclusion, as Muslims frequently encounter prejudice from landlords and homeowners, making it difficult for them to find homes outside their communities (Kumar & Rijesh, 2017; Rao, 2004). This often forces them to live in neighbourhoods with fewer resources and poorer living conditions, as highlighted by the Sachar Committee Report (Sachar Committee Report, 2006).

❑ Housing discrimination impact

❑ Stigmatization and solutions

The impact of this exclusion is further compounded by caste and class differences, which create additional barriers to upward mobility for these communities (Shani, 2008).

Religiously segregated neighbourhoods often face stigmatization, with media portrayals reinforcing negative stereotypes about Muslim-majority areas (Oza, 2020). This stigmatization makes it harder for residents, particularly women and young people, to find jobs or integrate into wider society (Kumar & Rijesh, 2017). Women in these communities often face restrictions that limit their educational and work opportunities, while young people struggle with the negative stereotypes associated with their neighborhoods. However, local efforts in areas like Jamia Nagar, where groups provide education and job training, are helping to improve the situation (Mitchell & Mitchell, 2024). To address religious exclusion, it's essential to ensure equal housing opportunities, improve services in marginalized areas, and create programs that foster interfaith understanding and reduce stigma, promoting a more inclusive and fair society (Oza, 2020; Shani, 2008).

❑ Spatial segregation worsens inequality

2.3.2.2 Spatial Segregation

Spatial segregation in cities significantly impacts how communities interact and access essential resources, often leading to inequality. When groups are separated by factors like race, religion, or income, their interactions with others become limited. This often results in poorer access to quality education, healthcare, and job opportunities for those in disadvantaged neighbourhoods, while wealthier areas benefit from better resources. Over time, this unequal distribution deepens socioeconomic disparities, making it harder for marginalized communities to improve their quality of life.

❑ Causes of spatial segregation

Several factors contribute to spatial segregation, with historical discrimination playing a major role (Oza, 2020). Economic disparities further reinforce this divide, as wealthier individuals can afford to live in neighborhoods with better schools and services, while poorer individuals remain in areas with fewer opportunities. Government policies and market-driven housing practices also perpetuate this separation, restricting mobility for marginalized groups and reinforcing cycles of poverty (Kumar & Rijesh, 2017; Rao, 2004).

The consequences of spatial segregation are far-reaching. Iso-

❑ Effects and solutions of spatial segregation

lated communities often experience social breakdown, leading to mistrust and misunderstandings between different groups. Poorer areas tend to have underfunded schools and healthcare facilities, resulting in worse educational and health outcomes. Limited access to job opportunities further entrenches poverty, while frustration and social deprivation can contribute to higher crime rates. To address these challenges, policymakers must ensure equitable access to resources across all neighborhoods, promote social cohesion, and reduce isolation, fostering a more inclusive and just society (Soja, 2010; Knott, 2005).

i. Ghettoization of religious minorities: Causes and consequences.

❑ Causes of Muslim ghettoization in India

The ghettoization of religious minorities, especially Muslims, in India is caused by a mix of historical, social, and political factors. One major reason is the history of violence and exclusion, like the partition of India and events such as the Babri Masjid demolition and the Gujarat riots. These incidents made Muslims feel unsafe, so they started living in Muslim-only areas to protect themselves. Additionally, laws and policies in some places make it difficult for Muslims to live in neighborhoods with people from other religions, pushing them into ghettos. Economic discrimination, such as landlords refusing to rent to Muslims, also forces many to stay in these segregated areas, limiting their opportunities to improve their lives. (Recap: Causes of Muslim ghettoization in India)

❑ Consequences of Muslim ghettoization

Living in ghettos has serious consequences for Muslim communities (Soja, 2010; Knott, 2005). Residents face social isolation, with fewer chances to interact with people from other backgrounds, which reinforces stereotypes and misunderstandings. Restricted access to essential services like healthcare, education, and employment traps many in poverty. Women, in particular, encounter additional barriers to education and work, while prolonged isolation can cause feelings of alienation and disconnection from broader society. Collectively, these factors create a cycle of exclusion that is difficult to break, affecting the well-being and future prospects of these communities (Sharma & Banerjee, 2020; Oza, 2020).

ii. Urban segregation and rural marginalization.

Urban segregation and rural marginalization in India are serious issues that affect many people, especially those

❑ Urban segregation and inequality

from disadvantaged groups like Scheduled Castes (SC), Scheduled Tribes (ST), and religious minorities like Muslims. In cities, segregation happens because wealthier people can afford to live in better areas, while poorer people are pushed into overcrowded neighborhoods with fewer resources. This inequality is made worse by caste and religious discrimination, where certain groups are left out and forced to live in specific parts of the city. Government policies sometimes make this worse by creating rules that help richer groups but limit access for poorer communities. This segregation causes problems like fewer schools, healthcare centers, and jobs in these areas, making it harder for people to improve their lives.

❑ Rural neglect and discrimination

In rural areas, the situation is equally challenging (Kumar & Rijesh, 2017; Ahuja, 1992). Rural communities often receive less government funding and infrastructure support, resulting in limited job opportunities, poor roads, and restricted access to education and healthcare. Marginalized groups, particularly those from lower castes and minority religions, face discrimination that prevents them from accessing resources or participating fully in local governance (Shani, 2008; Oza, 2020). Social hierarchies in villages can reinforce exclusion, keeping these communities trapped in poverty and limiting their ability to improve their livelihoods (Engineer, 1984; Rao, 2004).

❑ Cycle of poverty and discrimination

This lack of opportunities in both urban and rural areas leads to a cycle of poverty and social isolation. People from rural areas often move to cities in search of better chances, but they may end up in poor neighbourhoods where they face the same discrimination and limited resources. These groups are trapped in a system where they are separated from others, making it harder to build better lives for themselves. The impact is deep because it affects their ability to get good education, jobs, and healthcare, which keeps them stuck in poverty.

2.3.2.3 North-Eastern States and Christian Minorities

The North-Eastern region of India is unique for its cultural and ethnic diversity, with Christianity being an important religion in several states (Sharma & Banerjee, 2020; Kumar & Rijesh, 2017). Christianity is especially prominent in Nagaland, Mizoram, and Meghalaya, where it is the dominant faith (Mitchell & Mitchell, 2024). The spread of Christianity in the region dates back to British rule, when European missionaries intro-

❑ Christianity's role and tensions in North-East India

duced the religion to many tribal communities (Turner, 2013; Madan, 1992). Despite Christianity's strong presence, ethnic and religious tensions still exist, fueled by identity issues, land disputes, and political concerns. In places like Manipur, violent clashes between different groups, such as the Meitei Hindus and tribal Christians, highlight the challenges faced by Christian minorities (Oza, 2020).

❑ Challenges faced by Christian minorities in North-East India

Christian minorities in the North-East face significant challenges, often feeling excluded from political and social opportunities (Sharma & Banerjee, 2020). While the Indian Constitution provides protections for tribal communities, many Christian groups still struggle to access the benefits intended for them (Kumar & Rijesh, 2017; Rao, 2004). The Sixth Schedule, which safeguards tribal rights, is not always equally applied to all Christian communities, leaving some without fair representation in politics or access to resources. This exclusion contributes to inequalities in areas like education, employment, and healthcare, making it difficult for Christian minorities to thrive (Oza, 2020; Mitchell & Mitchell, 2024).

❑ Violence and economic struggles faced by Christian minorities in Manipur

In addition to social and political exclusion, violence against Christian communities has become a serious issue. In Manipur, for example, there have been violent attacks on churches and Christian homes by more dominant ethnic groups. This violence fosters fear and deepens divisions within the region, creating an environment where Christian minorities feel unsafe. Economic struggles also add to the difficulties, as many Christians in the region live in poverty and lack the opportunities for social and economic advancement available to other groups.

2.3.2.4 Tribal Areas of Central India and Religious Minorities

❑ Social exclusion and tensions among tribal communities in Central India

The tribal communities of Central India, including those in Madhya Pradesh, Chhattisgarh, and Jharkhand, are home to diverse groups such as the Gonds, Santhals, and Munda. These tribes have their own unique traditions, languages, and religious practices. While many of them continue to follow their ancestral beliefs, which often center around nature worship and ancestral spirits, others have converted to Christianity, influenced by missionary work. This religious shift has occasionally caused tensions within their communities, particularly for those who feel their traditional ways are threatened by outside influences. Despite their rich cultural heritage, tribal groups face significant

social exclusion, limiting their access to education, employment, and healthcare opportunities.

❑ Isolation, land loss, and economic struggles of tribal communities

One of the major challenges these communities face is their isolation, as many tribal people live in remote forested or hilly regions (Sharma & Banerjee, 2020; Soja, 2010). This geographical separation from mainstream society allows them to preserve their traditions but also prevents them from fully participating in modern economies. Certain groups, such as the Birhor, still rely on traditional hunting and gathering practices, further hindering their integration into the modern job market (Sharma & Banerjee, 2020). Many tribal communities struggle economically, with land as a central issue. Tribal people often lose their land to industries, mining, and powerful outsiders, which exacerbates their poverty and limits their economic opportunities (Kumar & Rijesh, 2017; Rao, 2004)

❑ Discrimination, poor policy implementation, and lack of representation for tribal communities

Despite legal protections meant to preserve their rights, including access to land and cultural preservation, tribal communities frequently face discrimination and marginalization. Government policies aimed at supporting tribal people are often not properly implemented, and tribal leaders feel that their voices are often ignored in political decisions. In many instances, the laws meant to safeguard their rights are not enforced, allowing exploitation and social exclusion to continue. The lack of adequate political representation and limited economic opportunities reinforce the cycle of poverty and disenfranchisement for many tribal people.

2.3.2.5 Jammu and Kashmir and Muslim Population

❑ Muslim majority in Jammu and Kashmir

Jammu and Kashmir is a unique region in India, with a significant Muslim majority. According to the 2011 census, around 68.3% of the population, approximately 8.44 million people, practice Islam, a much higher percentage compared to the national average of 14.2% (India - C-01, 2021). The Muslim population is distributed unevenly across the region, with the Kashmir Division having predominantly Muslim districts such as Badgam (97.65%) and Kupwara (94.59%). In contrast, the Jammu Division is mostly Hindu, with 67.5% of the population identifying as Hindu, although districts like Rajouri and Poonch have sizable Muslim populations, with Rajouri at 63% and Poonch reaching 90% (India - C-01, 2021)



❑ Kashmir's Muslim majority and diverse culture)

Islam was introduced to Kashmir in the 14th century and has shaped the region's cultural and religious identity ever since (Madan, 1992; Turner, 2013). Most Muslims in the region follow Sunni Islam, although there is a significant Shia presence in areas like Budgam (Madan, 1992). While Muslims form the majority, the region is also home to a diverse mix of religions, including Hindus, Sikhs, and Buddhists, contributing to its rich cultural and historical tapestry (Kumar & Rijesh, 2017; Rao, 2004). Jammu and Kashmir stands out as the only state in India with a Muslim majority, making it a distinctive and multi-ethnic region (Sharma & Banerjee, 2020)

2.3.2.6 Uttarakhand and Hindu Rural Areas

❑ Uttarakhand's rural challenges

Uttarakhand, located in northern India, has a predominantly Hindu population, with over 80% identifying as Hindu. The state is divided into two main regions: Garhwal and Kumaon, and is home to various communities, including Rajputs, Brahmins, and Scheduled Castes and Tribes. Muslims form the second-largest religious group, constituting around 10% of the population. Most of Uttarakhand's people, about 70%, live in rural areas, particularly in the hilly regions, where villages are small, traditional, and primarily reliant on farming and animal husbandry for their livelihood. However, many villages face challenges related to infrastructure and economic opportunities.

❑ Out-migration and rural challenges

One major issue in Uttarakhand is out-migration, where people leave rural areas to seek better job opportunities in cities due to poor infrastructure and limited resources in the hilly districts (Kumar & Rijesh, 2017; Sharma & Banerjee, 2020). Areas like Pauri Garhwal have seen significant population declines, while cities such as Dehradun and Haridwar have grown rapidly (Mitchell & Mitchell, 2024). The hilly regions still face difficulties with poor roads, inadequate electricity, and limited irrigation, making it difficult for residents to access basic services and sustain their livelihoods (Rao, 2004; Ahuja, 1992).

❑ Rural struggles, migration, and inequality

Despite these challenges, Uttarakhand's rural communities continue to struggle with out-migration, poor infrastructure, and limited access to healthcare and education (Kumar & Rijesh, 2017). Many villages are becoming "ghost villages," with abandoned homes as younger generations move to cities (Sharma & Banerjee, 2020). In addition, farming faces challenges due to small, scattered land holdings, reliance on unpredictable rainfall, and environmental problems like deforestation and climate change (Soja, 2010). Issues like caste and gender discrimination

also exacerbate social inequalities, further hindering access to opportunities (Shani, 2008; Turner, 2013). To improve life in rural Uttarakhand, targeted investments in infrastructure, education, healthcare, and fair opportunities for all are essential to create a more sustainable future (Kumar & Rijesh, 2017; Ahuja, 1992).

2.3.2.7 Bastar Region and Tribal Christian Minorities

Tribal Christians in the Bastar region of Chhattisgarh face severe discrimination and violence, making their lives increasingly difficult (Oza, 2020). Attacks on them have worsened, especially after the COVID-19 pandemic, with reports of Christians being denied burial rights in their own villages (Konikkara, 2022). Bastar has long been a region of conflict due to Maoist insurgencies, and religious tensions have further complicated the situation (Sharma & Banerjee, 2020; Turner, 2013). In 2022, over 200 tribal Christians were forced to leave their homes because of their faith, while many others now avoid church services out of fear (New Indian Express, 2022). The rise of religious majoritarianism has led to increased threats against Christian communities, forcing them to live under constant uncertainty (Shani, 2008; Marcovitz, 2010).

❑ Tribal Christians in Bastar face discrimination and violence

❑ Politics fuels tensions against tribal Christians in Bastar

❑ Tribal Christians in Bastar resist persecution and demand justice

Politics has played a major role in escalating these tensions. Some political groups and organizations have gained influence in Bastar by opposing religious conversions, using this stance to win tribal votes (Konikkara, 2022; Oza, 2020). Previously, the Congress party held more political power in the region, but the increasing link between religion, politics, and tribal identity has shifted dynamics (Sharma & Banerjee, 2020). As a result, tribal Christians have found themselves at the center of political and religious conflicts, further isolating them from their own communities (Shani, 2008). Without intervention, these tensions will only continue to grow, putting many more lives at risk (Rao, 2004; Kumar & Rijesh, 2017).

Despite the violence, tribal Christians in Bastar continue to resist and demand justice. Many displaced families have sought shelter in community halls, with local authorities in Narayanpur district providing basic support. In response to persecution, Christians have organized protests, filed complaints with the state governor, and gathered outside government offices to demand protection. Even in the face of threats, they remain resilient, holding on to their faith and supporting one another. Activ-



ists and social groups have stepped in to raise awareness, urging the government to take decisive action to safeguard minority rights and prevent further violence.

2.3.2.8 Andaman and Nicobar Islands and Religious Minorities

- ❑ Home to a diverse array of religious groups

The Andaman and Nicobar Islands are home to a diverse array of religious groups, including Hindus, Christians, Muslims, and indigenous tribes such as the Great Andamanese, Nicobarese, and Sentinelese. While the larger religious groups follow well-known practices, the indigenous tribes have their own unique spiritual beliefs centered around nature and ancestral spirits. The Nicobarese, for example, have incorporated some Hindu beliefs into their traditions. Despite the presence of mainstream religions, the indigenous communities continue to uphold their deeply rooted religious practices that have been passed down for generations.

- ❑ challenges in preserving their spiritual traditions

However, these communities face significant challenges in preserving their spiritual traditions. Colonization disrupted their ways of life by imposing foreign religions and prohibiting traditional ceremonies (Turner, 2013; Marcovitz, 2010). Over time, pressures from outside influences, including global religions and modern technologies, have caused them to lose some aspects of their cultural identity (Sharma & Banerjee, 2020). The loss of sacred lands due to development and resource extraction further threatens their religious practices, as sacred sites are destroyed and tribes are displaced from their ancestral lands (Soja, 2010). Political marginalization and discrimination exacerbate the issue, as indigenous communities often have little influence over decisions that impact their land and culture (Oza, 2020; Kumar & Rijesh, 2017). Preserving their religious beliefs requires respect for their rights and a commitment to safeguarding their unique spiritual heritage (Turner, 2013; Knott, 2005).

- ❑ Fosters community and identity

In conclusion, Religion in India is deeply connected with social structures, politics, and spatial dynamics. While it fosters community and identity, it also contributes to exclusion and conflict. Addressing religious exclusion requires legal reforms, inclusive policies, and proactive efforts to promote interfaith harmony. By understanding the historical and contemporary challenges faced by religious minorities, India can move toward a more inclusive and equitable society.

Summarised Overview

Religious minorities in India, including Muslims, Christians, and Dalits, often face systemic discrimination in employment, education, and housing, leading to deep-rooted social exclusion. This marginalization is historically entrenched, shaped by colonial policies, the traumatic Partition of India, and post-independence political strategies that have reinforced religious divisions. Communal violence, including mob lynching and riots, has further fractured social harmony, while legal and political measures such as anti-conversion laws and the politicization of religion have exacerbated exclusion. Religious minorities are frequently relegated to specific neighborhoods, restricting their access to essential resources, economic opportunities, and political representation. This socio-spatial segregation is particularly pronounced in regions like Jammu and Kashmir, the North-East, Uttarakhand, and tribal areas, where historical grievances and contemporary policies continue to deepen religious and social divides. Addressing these challenges requires proactive policy interventions, social awareness, and a commitment to fostering inclusive development.

Self-Assessment Questions

1. What are the key ways in which religion contributes to social inclusion and exclusion?
2. How has the caste system influenced religious-based discrimination in India?
3. Why is secularism important in the Indian context?
4. What historical events have shaped modern communal tensions in India?
5. How does spatial segregation impact religious minorities?
6. What are the consequences of religious-based violence?
7. How do legal frameworks impact religious conversion and minority rights?
8. What are the major socio-economic challenges faced by Muslims in India?
9. Why do religious minorities face difficulties in accessing housing?
10. How can interfaith dialogue contribute to reducing religious tensions?



Assignments

1. Discuss how religion acts as a factor in social exclusion in India.
2. How did British colonial policies contribute to communal divisions in India?
3. Explain the socio-economic impact of spatial segregation on religious minorities.
4. Analyze the role of the Indian Constitution in addressing religious-based exclusion.
5. Discuss the effects of anti-conversion laws on religious minorities.
6. What role does communalism play in religious-based violence in India?
7. Examine the impact of Partition on religious minorities in India and Pakistan.
8. How does ghettoization affect the economic mobility of religious minorities?
9. Assess the challenges faced by Christian minorities in North-Eastern India.
10. Suggest policy measures to reduce religious-based segregation in urban spaces.

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SGOU

Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU



BLOCK 3

Social Exclusion and Affirmative Action

UNIT 1

Caste, Gender and Religion

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ comprehend the origins and evolution of affirmative action in India for caste, gender, and religion
- ▶ analyze how affirmative action reduces discrimination and promotes equity among marginalized groups
- ▶ evaluate the impact of constitutional provisions on fostering inclusion and justice
- ▶ identify challenges and debates surrounding affirmative action for caste, gender, and religion

Background

What if you lived in a world where your identity—your caste, gender, or religion—determined your future? For centuries, millions of people have faced exactly that reality, with invisible barriers shaping their lives and dreams. In India, these divisions have been especially deep, creating systems of privilege for some and exclusion for many others. But how do you fix centuries of inequality? That’s where affirmative action steps in.

Let’s take a moment to think about a unique story of Adi Shankaracharya, the great philosopher of Advaita Vedanta, once asked a Chandala, an untouchable, to move aside on the streets of Kashi. The Chandala responded with a question that shook Shankara to his core: “*Are you asking this body to move, or the soul within? Because aren’t all souls the same?*” That moment wasn’t just a lesson in humility—it was a reminder that inequality is a human construct, and true wisdom lies in seeing beyond it.



This story mirrors the essence of affirmative action: breaking down the walls of inequality and creating opportunities for everyone, regardless of where they come from or who they are. Whether it's providing caste-based reservations, gender quotas, or protections for religious minorities, affirmative action is about giving a fair chance to those who've been left behind by history.

Of course, it's not always smooth sailing. Affirmative action sparks debates—Is it fair? Does it undermine merit? How long should it last? But one thing is clear: these policies have transformed countless lives, opening doors that were once firmly shut.

Keywords

Caste-based reservations, gender equality initiatives, religious minority schemes, social justice reforms, intersectional affirmative action

Discussion

❑ Inequalities and marginalization

Caste, gender, and religion are deeply intertwined social categories in India, often reinforcing systemic inequalities and marginalization. To counter these injustices, a combination of affirmative action policies and anti-caste movements has played a crucial role in promoting social justice. Affirmative actions, such as reservations in education, employment, and political representation, aim to uplift marginalized groups like Scheduled Castes (SCs), Scheduled Tribes (STs), Other Backward Classes (OBCs), women, and religious minorities. For instance, reservations in Panchayati Raj institutions have empowered women and marginalized communities to participate in governance. Alongside these policies, anti-caste movements led by B.R. Ambedkar, Jyotirao Phule, and Periyar have actively challenged caste hierarchies and patriarchal norms, advocating for equality, education, and self-respect among oppressed groups. These movements have also contributed to reforms, such as the abolition of untouchability and the democratization of education and resources. Together, these efforts underline the ongoing struggle for equity and the need for a more inclusive and egalitarian society.

In this chapter, we'll dive into the world of affirmative action in India. We'll uncover its roots, explore how it tackles caste, gender, and religious inequality, and discuss its triumphs and controversies.

3.1.1 Caste and Affirmative Action in India

❑ Caste system evolution

The caste system in India, a deeply entrenched social hierarchy, has roots in ancient history and remains a significant factor in Indian society. Believed to have originated around 1500 BCE with the arrival of the Aryans, it was initially based on occupational divisions and later solidified into a rigid structure known as *varna* and *jati*. The four primary *varnas*—Brahmins (priests), Kshatriyas (warriors), Vaishyas (traders), and Shudras (labourers)—eventually fragmented into thousands of sub-castes. These divisions became more rigid over time, marginalizing many communities. During British colonial rule, the caste system was further entrenched as colonial administrators exploited caste divisions for governance. However, towards the late 1920s, the British began implementing positive discrimination policies for lower castes in response to growing social unrest and demands for reform.

❑ Origins of affirmative action

The foundation of affirmative action in India can be traced to the early 20th century, during the colonial era. A major turning point was the introduction of separate electorates for Muslims in 1909, which expanded to include Sikhs and Christians. This marked the beginning of formal recognition of marginalized communities. The Poona Pact of 1932, a significant milestone, was negotiated between Dr. B.R. Ambedkar and Mahatma Gandhi. It abolished separate electorates for Scheduled Castes (SCs) but ensured reserved seats for them in legislative bodies, laying the groundwork for affirmative action. After independence in 1947, the Indian Constitution institutionalized these policies, providing reservations in education, employment, and political representation for Scheduled Castes, Scheduled Tribes (STs), and Other Backward Classes (OBCs). These measures aimed to address centuries of socio-economic injustices rooted in the caste system.

❑ Affirmative action debates

Despite constitutional provisions, affirmative action remains a subject of debate and controversy. While these policies have enabled political solidarity and upliftment among marginalized groups, they have also sparked societal tensions. For example, the Mandal Commission's 1990 recommendations to extend reservations for OBCs led to widespread protests, reflecting divisions over the fairness and impact of these measures. Affirmative action policies continue to enjoy significant public support due to their relevance to large sections of the population, particularly among lower castes. However, challenges persist as India grapples with deeply entrenched caste identities, political

opportunism surrounding reservations, and the broader quest for equity and justice in a stratified society.

From Kitchen Shadows to the Spotlight



In 1930, V. T. Bhattathirippadu shook Kerala's social fabric with *Adukkalayil Ninnum Arangathekku* ("From the Kitchen to the Stage"). This work challenged the oppressive norms of the Namboothiri community, spotlighting how women were confined to domestic spaces while advocating for their education and empowerment. With his pen as a weapon, Bhattathirippadu turned literature into a powerful tool for social reform, inspiring a journey of liberation that echoed far beyond the Namboothiri kitchens.

3.1.1.1 Anti-Caste Movements in India

Anti-caste movements in India are significant social and political efforts aimed at challenging the deeply entrenched caste system, which has historically marginalized certain communities. These movements seek to dismantle caste-based discrimination and promote social justice, equality, and representation for oppressed groups.

i. Dalit Movement

The Dalit movement in India is a powerful effort to improve the lives of Dalits, a group of people who have faced unfair treatment and discrimination because of the caste system (Omvedt, 2006; Goghari & Kusi, 2023). This movement, led by important leaders like Dr. B.R. Ambedkar, aims to ensure equality and justice for Dalits. Ambedkar worked hard to give

❑ Dalit empowerment movement

❑ Growth of Dalit movement

❑ Caste and gender reform

Dalits more rights through laws and policies that protect them from discrimination (Laxmikanth, 2020; DeSouza, Ahmed, & Alam, 2019). He also encouraged Dalits to leave behind caste-based practices by converting to Buddhism in 1956, which symbolized freedom and a new identity (Omvedt, 2006; Banerjee & Ghosh, 2018).

Over time, the Dalit movement has grown in strength and purpose. In 1972, the Dalit Panthers group emerged, inspired by the Black Panther Party in the U.S., to fight for the rights of Dalits and challenge unfair systems in society (Omvedt, 2006; Menon, 2010). After India's independence, the government introduced special measures like reserving seats in schools, jobs, and legislatures to help Dalits overcome the effects of years of discrimination (De Zwart, 2000; Biswas, 2019).

Even today, the Dalit movement continues to fight against caste-based discrimination and inequality. It has helped create organisations that work to protect the rights of Dalits and ensure they are treated with dignity. This movement, rooted in a long history of struggle and resistance, is a powerful reminder of the ongoing fight for equality and justice in India.

ii. Self-Respect Movement

The Self-Respect Movement was started in 1925 by E.V. Ramaswamy Naicker, also known as Periyar, in Tamil Nadu. Its main goal was to end the caste system, which treated some people as more important than others based on their birth. Periyar believed that everyone should be treated equally, and the movement encouraged people from lower castes to stand up for their rights. It also focused on making people think logically and reject old customs and superstitions that supported inequality.

One of the important achievements of the movement was the fight against Brahminical authority, which controlled much of society at the time. It helped people from lower castes gain more rights and reduced the power of the traditional caste system (Omvedt, 2006; DeSouza, Ahmed, & Alam, 2019). The movement also stood up for women's rights by encouraging them to get an education, have jobs, and make decisions about their own lives. For example, it supported women's right to divorce, remarry, and own property, marking a significant step toward gender equality (Banerjee & Ghosh, 2018).

The movement also celebrated Dravidian culture and languages, such as Tamil, Telugu, and Kannada, and worked to



❑ Dravidian pride and equality

promote pride in these local traditions (Menon, 2010). It helped create schools and learning opportunities for people who were often left out of education (Channaveer, Baikady, Sakaguchi, & Sheng-Li, 2020). Over time, the Self-Respect Movement inspired political changes in Tamil Nadu, where leaders began to focus on creating a more equal society. Even today, its ideas about fairness, equality, and logical thinking continue to influence social movements across India (Omvedt, 2006; DeSouza, Ahmed, & Alam, 2019).

iii. Satyashodhak Samaj

❑ Satyashodhak Samaj for equality

The Satyashodhak Samaj, or "Truth-Seekers' Society," was founded by Jyotiba Phule on September 24, 1873, in Pune, Maharashtra, to challenge the caste system and promote equality (Omvedt, 2006; Banerjee & Ghosh, 2018). At a time when society was deeply divided by caste and gender discrimination, the Samaj fought against the dominance of the Brahmanical hierarchy and advocated for the rights of marginalized groups like Dalits, Shudras, and women (DeSouza, Ahmed, & Alam, 2019; Kurup, 1994). Phule believed that everyone should have direct access to God and equality in society, rejecting the oppressive practices tied to caste and religion (Omvedt, 2006).

❑ Education and social reform

The Samaj focused on education as a powerful tool for change, especially for women and lower castes. Savitribai Phule, Jyotiba's wife, played an essential role by setting up schools for girls and marginalized communities (Menon, 2010; Channaveer, Baikady, Sakaguchi, & Sheng-Li, 2020). Alongside education, the Samaj worked to end untouchability, promote inter-caste marriages, and ensure civil rights for oppressed groups. It also criticized religious rituals controlled by Brahmins, empowering people to worship without intermediaries (Omvedt, 2006; Goghari & Kusi, 2023).

❑ Social justice legacy

The movement inspired future reforms and leaders, including Dr. B.R. Ambedkar, in their fight for social justice. It also encouraged lower-caste communities to unite and stand up against exploitation, such as during peasant uprisings. Though the Samaj declined in the 1930s, its legacy of equality, justice, and education still resonates, reminding us of the importance of breaking barriers and ensuring dignity for all.

iv. Justice Party Movement

❑ South Indian Liberal Federation

❑ Social reforms by Justice Party

The Justice Party, also known as the South Indian Liberal Federation, was formed on November 20, 1916, in Madras to stand up for non-Brahmin communities in British India. It was created by leaders like Dr. C. Natesa Mudaliar, T. M. Nair, P. Theagaraya Chetty, and Alamelu Mangai Thayarammal to fight against the unfair advantages enjoyed by Brahmins in education and government jobs. The party worked to give everyone a fair chance, especially those from underrepresented groups.

The Justice Party became powerful after winning elections in 1920 in the Madras Presidency. It introduced major reforms such as caste-based reservations to help people from marginalized communities gain better opportunities in education and jobs (De Zwart, 2000; Biswas, 2019). The party also supported women's rights, making it possible for Dr. Muthulakshmi Reddy to become India's first woman legislator (Banerjee & Ghosh, 2018; Channaveer, Baikady, Sakaguchi, & Sheng-Li, 2020). These efforts helped many people who had been ignored for years to have a voice in society.

Food and Caste - The Divide Between Pucca and Kaccha

In India, food was once seen as a way to show someone's caste. Pucca food, which was fully cooked (with ghee) and considered pure, was mostly eaten by higher castes like Brahmins. On the other hand, kaccha food, which was raw or not fully cooked, was linked to lower castes and seen as impure. This food divide helped maintain the social rules of the caste system, with food being more than just what we eat—it was a symbol of status.

Although the Justice Party lost influence after 1937, its ideas lived on. In 1944, it transformed into the Dravidar Kazhagam, a movement led by Periyar E. V. Ramaswamy, focusing on social justice. The party's efforts inspired the creation of major political parties like the DMK and AIADMK, which have shaped Tamil Nadu politics for decades. The Justice Party is remembered for standing up for fairness and helping communities that had been left out get a better chance in life. - Periyar E. V. Ramaswamy



Anti-caste movements in India have fought against caste discrimination through legal reforms and social change. They have led to affirmative action, greater political representation for lower castes, and social reforms challenging caste-based oppression. Using both reformist and radical strategies, these movements continue to push for equality and justice for marginalized communities.- **greater political representation**

3.1.1.2 Anti-Caste Movements in Kerala

Anti-caste movements in Kerala have a dense history, characterized by various social reform initiatives aimed at dismantling the hierarchical caste system and promoting equality. These movements emerged as a response to the entrenched caste discrimination prevalent in society, particularly against marginalized communities.

i. The Channar Revolt

The Channar Revolt (1822–1859) was an important movement in the state of Travancore (now part of Kerala) where the Nadar community, especially its women, fought against caste-based oppression. One of the main reasons for the revolt was the rule that Nadar women could not cover their upper bodies, a privilege that was only allowed for upper-caste women. This dress code was a symbol of the unfair treatment they received in society. The restriction on their clothing showed how lower-caste communities like the Nadar were treated as inferior, and it was this injustice that sparked the revolt.

❑ Nadar women's fight against caste oppression

The revolt grew stronger when many Nadar women converted to Christianity and started wearing new clothes, like blouse and mundu. These changes challenged the caste system because it blurred the lines between lower-caste and upper-caste women. The upper-caste people did not like this and saw it as a threat to their authority and way of life. Christian missionaries helped by providing clothes to the women, which angered the Hindu upper castes and led to more conflict. The revolt was also fueled by British colonial rule, which added extra taxes that hurt the Nadar community even more. This unfair treatment made the women fight for their rights.

❑ Nadar women challenge caste through new clothing and Christian conversion

In 1859, after many years of struggle and pressure from the revolt, the king of Travancore finally gave in and allowed Nadar women to wear upper-body clothing of their choice. This was a huge victory for the revolt, as it showed that even deeply

☐ Victory of the Channar Revolt

held traditions could be changed when people fought together for their rights. The Channar Revolt is remembered as an important moment in the fight against both caste and gender discrimination in Kerala. It helped inspire future movements and showed how challenging caste and gender-based injustice was an important part of creating a more fair society.

ii. The Kallumala Samaram

☐ The Kallumala Samaram protest against caste restrictions

The Kallumala Samaram, or Stone Necklace Protest, was a major event in Kerala in 1915 led by women from the Pulayar community, who were part of the Dalit (lower caste) group. At that time, lower-caste people were not allowed to wear certain clothes or jewelry, like necklaces made from stone or glass, which marked them as inferior in the eyes of society. This protest began when Pulaya women demanded the right to cover their bodies, which led to fights with upper-caste men. Their fight grew stronger when, on October 21, 1915, Ayyankali, a leader in the Dalit rights movement, organized a large gathering where women threw away their stone necklaces. This was a bold statement against caste-based rules and a fight for the right to wear what they wanted, challenging the caste system.

☐ Inspired further movements

The protest not only led to violent clashes but also ended in a court case where the Dalit community won. This victory was very important because it showed that lower-caste people had the right to live with dignity and to make their own choices. The Kallumala Samaram inspired many other social reform movements, encouraging lower-caste people to demand their rights and join together to fight for justice. It also helped many realize how important it was to get involved politically, leading to a stronger voice for marginalized communities.

☐ promoted equality

Culturally, the protest changed how people viewed what clothes and jewelry lower-caste individuals could wear. By rejecting the stone necklaces, the protest helped create a new sense of self-respect and equality. It also highlighted the role of women in making social changes. The Kallumala Samaram became a turning point in the fight against caste discrimination in Kerala and continues to inspire movements today, showing the importance of challenging unfair systems and the power of marginalized groups in standing up for their rights.



iii. The Vaikom Satyagrah

The Vaikom Satyagraha (1924-1925) was an important movement in Travancore, aimed at challenging caste-based restrictions, particularly the exclusion of lower-caste Hindus from using public roads leading to the Vaikom Mahadeva Temple. The movement was initiated in response to a ban, imposed in 1811, which prohibited lower-caste individuals from accessing certain roads to the temple. Leaders like T.K. Madhavan and K.Kelappan, inspired by the teachings of social reformers like Sree Narayana Guru, led the agitation, which attracted national attention, with support from figures such as Mahatma Gandhi and Periyar E.V. Ramasamy. The movement began on March 30, 1924, when groups of satyagrahis from various castes started marching towards the temple, facing police resistance and arrests, demonstrating unprecedented unity against caste oppression.

□ Vaikom Satyagraha against caste barriers

The Vaikom Satyagraha, lasting for over 600 days, achieved partial success, with the opening of three of the four roads to the temple for all castes. However, one road remained restricted, leading to some discontent among activists. Despite this, the movement was instrumental in raising awareness about untouchability and caste discrimination, contributing to the Temple Entry Proclamation of 1936, which allowed lower-caste individuals access to temples across Travancore. The protest sparked political awareness and inspired similar movements across India, laying the groundwork for future struggles against caste-based discrimination. It also marked a significant moment in India's broader social justice and equality movements.

□ Impact of Vaikom Satyagraha

Mahatma Gandhi's involvement in the Vaikom Satyagraha was crucial. Gandhi emphasized nonviolent resistance and promoted negotiation to achieve the movement's goals. His engagement, particularly after 1925, helped sustain the movement by mobilizing support from various communities, including Muslims and Christians, who contributed resources to the satyagrahis. Gandhi's efforts to facilitate a compromise, allowing partial access to the temple roads, were pivotal, though the movement faced criticism from Periyar and other leaders. Periyar believed that Gandhi's reforms were insufficient and advocated for a more radical approach to tackle caste oppression, which eventually led him to distance himself from Gandhi's methods.

❑ Influence of Vaikom Satyagraha

The Vaikom Satyagraha also played a significant role in shaping social reform movements in Kerala. It invigorated the Sree Narayana Dharma Paripalana Yogam (SNDP), which aimed to create inclusive spaces for all castes within religious practices. The movement's success in fostering political consciousness among marginalized communities inspired similar temple entry and social justice campaigns throughout India. While Gandhi's nonviolent methods won support, the movement also underlined ideological rifts within the anti-caste struggle, with Gandhi advocating for gradual reforms and Periyar pushing for radical social change. This division remains a critical point of understanding the varying strategies in the fight against caste discrimination.

iv. Sree Narayana Guru and the SNDP Movement

Sree Narayana Guru (1856-1928) was a respected social reformer and spiritual leader of Kerala. He is best known for starting the Sree Narayana Dharma Paripalana (SNDP) Movement to uplift the Ezhava community and promote social equality. At that time, many lower-caste people, especially the Ezhavas, faced discrimination and had limited access to education, temples, and jobs. The SNDP Movement worked to change these conditions by fighting for the rights of marginalized communities.

❑ SNDP Movement for social equality

The movement began in 1888 with the Aruvippuram Movement, led by Sree Narayana Guru, which aimed to stop social injustice and improve the lives of the Ezhavas. It became more organized in 1903 when it officially became the SNDP Movement, with goals focused on education, social equality, and political representation. The movement set up schools to teach literacy, fought for equal rights for all castes, and worked to ensure that backward castes could participate in politics. One of its key slogans, "Oru Jathi, Oru Matham, Oru Daivam, Manushyanu" (One Caste, One Religion, One God for all), helped unite people from different communities in the fight for their rights.

The SNDP Movement brought about significant changes in Kerala. It helped many people from backward castes gain better opportunities and improve their lives, while challenging the power of higher castes, especially Brahmins. The movement also united marginalized communities, making them stronger in their fight for equality. Sree Narayana Guru's ideas continue to inspire people who work for fairness and justice, and his vision of a society where everyone is treated equally still guides social reform movements today.



v. Ayyankali and the Sadhu Jana Paripalana Yogam

Mahatma Ayyankali (1863-1941) was a great leader who fought for the rights of Dalits, especially in Kerala. He was born into the Pulayar community, a group that faced harsh discrimination. People from his community were not allowed to own land, go to school, or enter public places. Ayyankali saw this injustice and decided to fight against it. Because of his strong leadership, he was called the "King of Pulaya." He worked hard to improve the lives of Dalits and make sure they were treated fairly in society.

❑ King of Pulaya

In 1907, Ayyankali started an important group called the Sadhu Jana Paripalana Sangam (SJPS). This organization brought together oppressed people and fought for their rights. One of its biggest goals was to ensure Dalit children could go to school, which was not allowed at the time. SJPS also fought for land rights so that labourers who worked on farms could own land. Another major success was improving working conditions by introducing a six-day workweek, giving workers a day off on Sundays.

❑ SJPS for Dalit rights, education, and better work conditions

Ayyankali believed that education, discipline, and awareness were important to improving the status of Dalits. His group used folk arts and cultural programs to spread messages of equality. Despite facing strong opposition, his efforts led to important changes, such as allowing Dalit children to attend public schools. His work laid the foundation for the Dalit rights movement in Kerala. Even after his death in 1941, SJPS and other organizations like the Pulayar Maha Sabha continued his mission. His fight for justice and equality remains an inspiration for social movements in India today.

❑ Dalit empowerment through education and activism

vi. Guruvayur Satyagraha

The Guruvayur Satyagraha was a peaceful protest held from 1931 to 1932 in Kerala. Its main goal was to allow people from lower castes, who were unfairly labeled as untouchables, to enter the Guruvayur Temple, a sacred place for Hindus. At the time, caste-based discrimination denied untouchables access to temples and public spaces. The movement was led by K. Kelappan and supported by leaders like A.K. Gopalan and Mannathu Padmanabhan under the Kerala Provincial Congress Committee (KPCC). On November 1, 1931, the protest began with volunteers peacefully trying to enter the temple while singing hymns to demand equal rights.

❑ Temple entry protest for Dalits

❑ Kelappan's hunger strike and national support for temple entry

❑ Guruvayur Satyagraha's impact on social justice and reforms

❑ Movements for political rights of marginalized communities

A turning point came in 1932 when K. Kelappan went on a hunger strike for 12 days to highlight the injustice faced by untouchables (Omvedt, 2006; Menon, 2010). His actions drew national attention, including support from Mahatma Gandhi, who urged him to end the fast on October 2, 1932 (DeSouza, Ahmed, & Alam, 2019). A referendum was later conducted in the Ponnani region, where over 77% of respondents supported temple entry for all castes (Kurup, 1994). Although the temple did not immediately open its doors to everyone, the Satyagraha played a key role in changing public opinion about caste discrimination and untouchability (Omvedt, 2006; Banerjee & Ghosh, 2018).

The Guruvayur Satyagraha is remembered as a major step forward in the fight for social justice. While the immediate goal of temple entry was not achieved, the movement brought national attention to the issue of untouchability and inspired future reforms. In 1936, the Maharajah of Travancore issued a landmark law allowing people of all castes to enter temples in Kerala. This movement not only challenged discrimination but also united people from different religions and communities, showing the power of peaceful protests in achieving equality and justice.

vii. Joined Political Conference and Nivarthana Movement

The Joined Political Conference and the Nivarthana Movement were significant socio-political movements in Travancore during the early 20th century. These movements aimed to challenge the systemic discrimination faced by marginalized communities, including the Ezhavas, Christians, and Muslims, in the political sphere. The Nivarthana Movement, also called the Abstention Movement, arose in response to the 1932 administrative reforms, which upheld property-based qualifications that excluded non-upper caste groups from representation in the Legislative Assembly. In January 1933, a coalition of leaders from these communities, under the leadership of T.M. Varghese formed the All Travancore Samyuktha Rashtriya Congress, later known as the Joined Political Conference, to collectively advocate for equal political rights.

Prominent leaders like C. Kesavan played major role in the movement. Kesavan's powerful speech at a 1935 meeting in Kozhencherry, where he criticized the ruling Diwan for perpetuating inequality, rallied public support but also led to his arrest. This arrest further fueled public agitation, intensifying the demands for fair representation. The movement's main demand



❑ Kesavan's leadership and reforms for political representation and temple access

was proportional representation in the Assembly based on population demographics. The sustained protests led to significant outcomes, including a reduction in upper-caste dominance in governance and landmark reforms such as the Temple Entry Proclamation of 1936, which granted all Hindus the right to access temples, regardless of caste.

The anti-caste movements in Kerala focused on education, challenging caste discrimination, and uniting marginalized communities. Reformers believed education was key to empowerment, improving literacy among oppressed groups. These movements' impact is still seen today in efforts to fight discrimination and promote equality, reminding us of the ongoing need for social justice in modern India.

3.1.1.3 Caste Based Reservations

❑ Affirmative action for equality

India's affirmative action policies, also called "reservations," are designed to help people from communities that have faced unfair treatment in the past, such as Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs). These policies are part of the Indian Constitution, which aims to make sure that everyone has a fair chance, especially in areas like education, jobs, and politics. The government has reserved a certain number of seats for SCs, STs, and OBCs in schools, government jobs, and legislative bodies to make sure they are included in public life.

❑ Abolition of untouchability, equal rights

The Indian Constitution, adopted in 1950, introduced important changes to stop caste-based discrimination and ensure equality. One of the major steps was the abolition of "untouchability," which means that no one can be treated unfairly just because of their caste. The Constitution also guarantees equal rights for everyone, ensuring that no one can be discriminated against because of their caste, religion, gender, or where they were born. It also provides equal opportunities for all citizens, especially in government jobs, making sure people from lower castes can work in public roles.

In addition to these protections, the government has passed special laws to protect marginalized communities further. For example, the Protection of Civil Rights Act, 1955, punishes anyone who practices untouchability, while the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act, 1989, prevents violence against these groups. Special bodies like the National Commission for Scheduled Castes were created to make sure these rules are followed and to investigate

complaints about discrimination. These laws and policies work together to create a fairer society for everyone in India.

3.1.1.4 Social Welfare Schemes for Scheduled Castes in India

The Indian government has implemented numerous social welfare schemes aimed at addressing the historical injustices faced by Scheduled Castes (SCs). These initiatives focus on improving education, economic opportunities, and social inclusion, ensuring that SC communities can participate equally in society.

i. Educational Empowerment

Education-focused schemes are central to SC welfare programs. The Post Matric Scholarship for Scheduled Caste Students (PMS-SC) is one of the most significant initiatives, providing financial assistance for higher education since 1944, fully funded by the central government. Pre-Matric Scholarships also support SC students at the school level, ensuring financial constraints do not disrupt their early education. Programs like the National Fellowship for Scheduled Caste Students and the Coaching and Allied Scheme for SC Candidates enable access to higher education and competitive exam preparation, fostering academic advancement and professional growth.

☐ education welfare

ii. Economic Empowerment

Economic development is another critical focus area. The National Scheduled Castes Finance and Development Corporation (NSFDC) offers loans, skill training, and entrepreneurial support for SC beneficiaries living below the poverty line. Similarly, the Credit Enhancement Guarantee Scheme for Scheduled Castes, launched in 2015, provides credit guarantees to young entrepreneurs, making it easier for them to secure loans for business ventures. Moreover, the Special Central Assistance to Scheduled Castes Sub-Plan (SCSP) ensures targeted financial resources flow into SC-majority areas based on population data, enabling sustainable development in these communities.

☐ economic empowerment



iii. Social Empowerment

❑ Social protection

Social inclusion and protection are addressed through initiatives like the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act, 1989, which safeguards SCs from violence and discrimination while providing financial support to victims and promoting awareness. Schemes like the Pradhan Mantri Adarsh Gram Yojana (PMAGY) focus on integrated development in SC-dominated villages by aligning government programs for maximum impact. To further encourage social integration, the government offers incentives for inter-caste marriages, promoting unity and reducing caste-based discrimination.

iv. Skill Development and Institutional Support

❑ Skill development

Skill development initiatives for Scheduled Castes (SC) in India focus on enhancing capabilities, promoting entrepreneurship, and ensuring economic participation through targeted government support. The National SC ST Hub (NSSH) provides free skill training for SC-ST entrepreneurs, covering sectors like electronics, textiles, and food industries. The National Skill Development Policy emphasizes public-private partnerships, state-level missions, and lifelong learning to address skill gaps. Financial assistance, including pre-matric and post-matric scholarships, ensures educational access for SC students. The NSFDC Skill Training Programs offer NSQF-compliant, employment-oriented training, while the Entrepreneurship Skill Development Program (ESDP) equips SC individuals with financial and digital literacy for business ventures. These initiatives collectively foster economic empowerment and social inclusion for SC communities.

The government's multifaceted approach to SC welfare combines educational, economic, and social initiatives. These programs not only address historical inequities but also aim to empower SC communities to achieve equality and integration within Indian society.

Affirmative action has significantly empowered marginalized groups but remains a contentious issue. Critics argue it may cause reverse discrimination against privileged castes and is often politicized for electoral gains. To maintain meritocracy, the Supreme Court has capped reservations at 50%. There is also debate over extending reservations to economically weaker upper castes, which some believe dilutes the policy's original

❑ Affirmative action debate

❑ Balancing caste and economy

❑ Women empowerment initiatives

❑ Challenges in women's progress

intent of uplifting historically oppressed communities. Despite these controversies, affirmative action continues to enjoy strong public support, especially among its beneficiaries.

Recent discussions emphasize the need for a balanced approach to affirmative action, considering both caste-based inequalities and economic disparities. While caste remains central to social stratification, economic status also affects access to opportunities. The challenge is to address both without undermining social justice. Overall, India's affirmative action policies reflect a dynamic interplay of historical injustices and evolving socio-political realities.

3.1.2 Gender and Affirmative Actions in India

In India, affirmative action helps women overcome unfair treatment and get better opportunities. The Constitution supports this effort through Article 15(3), which allows the government to make special rules to help women. These rules aim to fix problems that make it harder for women to go to school, find jobs, or take part in decision-making. By giving women more support, the government hopes to bring real equality between men and women.

The government has started many programs to help women. For example, scholarships and schemes like the National Scheme of Incentive to Girls for Secondary Education encourage girls to stay in school. In politics, one-third of seats in village councils (Panchayati Raj institutions) are reserved for women, although a law to do the same in Parliament is still waiting to be passed. The government is also helping women learn new skills and start businesses through programs like the National Mission for Women, which combines many women-focused projects to make them more effective.

These programs have made a difference, but challenges remain. While more girls are going to school, many still drop out early, especially in secondary school. Fewer women are joining the workforce, with only about 23% working as of recent data. Cultural beliefs often make it harder for women to get the education and jobs they deserve, even when programs are in place to help them.

India also follows international rules like the Sustainable Development Goals (SDGs), which call for gender equality. Goal 5 focuses on ending violence and discrimination against women and empowering them. While India has made progress, much



more work is needed. For true equality, the government must not only make better rules but also help society change its attitudes toward women.

***Throwing Like a Girl-
From Insult to Empowerment!***

Did you know? The phrase "*throwing like a girl*" was once used to imply someone was throwing weakly, but today it's being reclaimed as a phrase of pride. Female athletes and supporters now use it to celebrate strength and skill, proving that anyone, regardless of gender, can throw with power and accuracy. It's all about challenging stereotypes and showing that talent isn't tied to gender!

3.1.2.1 Social Welfare Schemes for Gender Equality

Gender equality is essential for a fair and just society, but many barriers still prevent equal opportunities for all genders. To address these challenges, governments and organizations implement social welfare schemes that promote women's empowerment, economic independence, and social inclusion. These schemes focus on education, employment, healthcare, and legal rights, helping to bridge the gender gap. By ensuring equal access to resources and opportunities, these programs play a crucial role in creating a more inclusive and equitable society.

i. Beti Bachao Beti Padhao (Save the Daughter, Educate the Daughter)

The Beti Bachao Beti Padhao (BBBP) scheme, launched by the Indian government on January 22, 2015, aims to promote gender equality and empower girls by addressing gender discrimination and ensuring more girls attend school and participate in society. The initiative focuses on spreading awareness about the value of girls and includes efforts from various sectors. A notable component of the scheme is the Sukanya Samriddhi Yojana, which helps families save for their daughters' education and marriage. Since its launch, the program has led to significant achievements, including improvements in the Sex Ratio at Birth (SRB) and an increase in girls' enrollment in secondary education.

☐ Empowering girls' education

❑ Challenges in implementation

Despite these successes, the program faces several challenges. Deeply ingrained cultural practices, such as dowry and child marriage, hinder acceptance of change, and administrative issues like poor coordination between government departments have slowed progress. Indeed, a large portion of the scheme's budget is allocated to advertising and awareness campaigns, rather than directly supporting girls. Tracking the program's success is also problematic, as many areas fail to collect accurate data on the scheme's impact, especially in marginalized communities. These challenges need to be addressed to further improve the program's effectiveness.

❑ Measuring progress through key indicators

The success of BBBP is measured through indicators such as the SRB and the Gross Enrollment Ratio for girls in secondary schools, which have both seen positive improvements. These metrics show progress toward gender equality and highlight the growing number of girls continuing their education. The scheme also evaluates its success through awareness campaigns and community programs that encourage families to value girls, thereby promoting gender equality and social change. These efforts have helped build community support for girls' education, health, and overall development.

❑ Evaluations guide program improvements

To ensure continued progress, the government conducts independent evaluations and surveys to assess the program's impact, especially in disadvantaged areas. These evaluations help identify areas of improvement and allow for adaptations to the program, ensuring it remains effective in empowering girls and addressing challenges related to cultural resistance, administrative inefficiencies, and financial issues. While BBBP has made significant strides, overcoming these obstacles will be crucial for its continued success and for creating lasting change for girls in India.

ii. Pradhan Mantri Matru Vandana Yojana

❑ Financial support for maternal health

The Pradhan Mantri Matru Vandana Yojana (PMKVY), launched on January 1, 2017, aims to improve maternal and child health in India by providing financial assistance to pregnant and lactating women, particularly those from economically disadvantaged backgrounds. The scheme offers cash incentives of ₹5,000 for the first live birth and ₹6,000 for a second girl child, contingent upon fulfilling specific maternal health service requirements. However, women employed in government or public sectors, or those already receiving similar benefits under other programs, are excluded. The initiative helps reduce the

economic burden on families, ensuring better access to health-care and supporting vulnerable groups during a critical period of maternal and child health.

One of the primary objectives of PMMVY is to promote improved health-seeking behaviours among women. The scheme encourages early pregnancy registration, regular health check-ups, and better nutrition, which are essential for improving maternal and child health outcomes. The financial assistance not only mitigates wage loss but also enables women to focus on recovery and self-care during and after pregnancy. The program also targets malnutrition by supporting beneficiaries in investing in nutritious food and healthcare services. And PMMVY promotes institutional deliveries and child immunizations, which are key to improving long-term health standards and breaking the cycle of poor health across generations.

❑ Promoting maternal health

Despite its positive impact, PMMVY faces challenges in fully achieving its objectives. Although the scheme has increased healthcare service utilization, its direct influence on critical health metrics like maternal anemia and low birth weight remains unclear. Some beneficiaries have reportedly used the financial assistance for non-health-related expenses, signaling a need for better awareness and guidance on the scheme's intended use. Nevertheless, the program continues to positively affect families by reducing healthcare costs and providing financial support. In the long term, PMMVY holds the potential for significant economic and social benefits, including gender equity through additional incentives for second girl children, making it an essential part of India's efforts to strengthen maternal and child health.

❑ Challenges and potential benefits

iii. Mahila Shakti Kendra

Mahila Shakti Kendra (MSK) is a program started by the government in 2017 to help women in villages become stronger and more independent. It gives women training to learn new skills, find jobs, and know their rights. MSK works like a one-stop help center where women can easily access various government services. It runs at different levels – national, state, and district – and encourages communities to work together to solve problems faced by women, like domestic violence. It also inspires women to become leaders in their own communities.

❑ Challenges and potential benefits

Kerala's Gender Balance

Despite 90% of jobs worldwide demanding basic digital skills, the digital gender gap remains stark globally, 1 in 4 women lacks access to a mobile phone, and in South Asia, women are 28% less likely than men to own one, limiting their participation in the digital economy. This highlights how unequal access to technology perpetuates economic disparity.

❑ Support for women facing violence

MSK also plays a big role in helping women who face violence at home. It has special centers called One Stop Centres (OSCs) that provide immediate support, like medical help, legal advice, and counseling. These centers also offer temporary shelter to women in need. MSK runs awareness programs to educate women about domestic violence and connects them with legal services and long-term support systems. Through skill training and community activities, it helps women regain confidence and stand up for themselves.

❑ Skill development and empowerment for rural women

MSK helps rural women improve their lives by teaching them important skills. It offers training for jobs, lessons on health and good nutrition, and even digital literacy so women can use technology confidently. Student volunteers work with MSK to teach women about government programs that can help them and talk about social issues that affect them. This way, women in villages can feel empowered and take charge of their lives.

By focusing on skill development, awareness, and community support, Mahila Shakti Kendra ensures women in villages can live with dignity and achieve their dreams.

❑ Safe housing for working women

iv. Working Women Hostel Scheme

The Working Women Hostel Scheme is a government program designed to provide safe and affordable housing for women who work in cities, small towns, and even villages. These hostels have facilities not only for the women but also for their children, making it easier for mothers to balance work and family life. To be eligible, a woman's income must be less than ₹50,000 a month in big cities or ₹35,000 in other areas. Women can stay for up to three years, and in special cases, the stay can be extended for up to five years. The scheme also supports women who are undergoing job training, with certain limits on how many people can stay at one time.



❑ Support for working mothers

The hostels are designed to help working women feel secure while focusing on their careers. Mothers can even bring their children to stay with them, ensuring a safe environment for kids while their mothers are at work. This feature is especially helpful for women who might otherwise struggle to care for their children while holding down a job. Some hostels also provide daycare services, making life even easier for working mothers.

In addition to housing, the scheme encourages the building of more hostels in different areas to meet the growing demand. It ensures that women have access to affordable accommodations while pursuing their professional goals. This initiative is a significant step towards empowering women by supporting their independence and providing them with a secure place to live.

v. Swadhar Greh Scheme

❑ Shelter and rehabilitation for distressed women

The Swadhar Greh Scheme, run by the Ministry of Women and Child Development, is designed to provide shelter, food, clothing, medical care, and legal aid to women in distress. This includes women facing violence, abandonment, or social exclusion. Each Swadhar Greh can house up to 30 women and focuses on emotional and economic rehabilitation, helping them rebuild their lives with dignity. The scheme collaborates with NGOs and government organizations to effectively manage these homes across India.

❑ Emotional support and rehabilitation for women

To support women emotionally, the scheme offers counseling services where professional counselors help women process trauma and regain confidence. A supportive environment is created, allowing women to share their experiences and find comfort in peer support. Also, legal aid and guidance are provided to help women overcome legal challenges, reducing their stress and uncertainty about the future. Rehabilitation programs such as skill development and vocational training further empower women by improving their self-esteem and independence.

By addressing both emotional and practical needs, the Swadhar Greh Scheme ensures that women in difficult situations can heal and rebuild their lives. It aims to empower them through nurturing care and opportunities for personal and economic growth, creating a path toward a more stable and independent future. Affirmative action for women in India is a critical component of the broader effort to achieve gender equality. While there have been notable advancements due to government initia-

tives and constitutional provisions, persistent challenges necessitate ongoing reforms and effective implementation strategies. Enhanced focus on cultural change alongside policy measures will be essential for achieving substantive equality for women in India.- **gender equality**

3.1.3 Religion and Affirmative Action in India

India has many religious communities, including minorities like Muslims, Christians, Sikhs, Buddhists, and Jains. These groups often face challenges like discrimination, violence, and political tensions. Muslims are mainly in states like Uttar Pradesh, Bihar, West Bengal, and Kerala, while Sikhs mostly live in Punjab and Christians in states like Nagaland and Mizoram. Since 2014, concerns about discrimination against religious minorities have increased.

In India, affirmative action mostly helps Scheduled Castes (SCs) and Scheduled Tribes (STs), but religious minorities like Muslims and Christians get less help. The Constitution doesn't allow reservations based on religion, but some reports suggest these groups need more support. The 2005 Sachar Committee showed that Muslims face many difficulties and need help. However, there are legal barriers and resistance to providing this support. Recently, Muslims and Christians have come together to demand equal rights in affirmative action. Some states have placed Muslims and Christians from Scheduled Caste backgrounds in the Other Backward Classes (OBC) category for benefits, while Scheduled Tribes get support regardless of their religion.

☐ Affirmative action for minorities

Rights for Minority Schools in India

In India, Article 30 of the Constitution gives religious and language minorities the right to start and run their own schools. This helps them keep their culture and traditions alive! Plus, there's a special body called the National Commission for Minority Educational Institutions (NCMEI) that makes sure these schools are supported and their rights are protected.

3.1.3.1 Reservation for Religious Minorities

India has a long and complex history with reservations for religious minorities. During British rule and the early years of



❑ Complex history of religious reservations

independence, Muslims, Christians, and Sikhs were considered for reservations, but over time, the focus shifted to social and educational backwardness rather than religion alone. The Constitution allows special provisions for disadvantaged groups, and courts have ruled that religious communities can receive reservations if they face social backwardness. Some states, like Kerala and Karnataka, have included Muslims in backward class categories. In 2012, the government proposed a 4.5% sub-quota for minorities within the 27% OBC reservation, but courts struck down similar efforts, such as Andhra Pradesh's 5% Muslim quota. Today, there is no specific reservation for religious minorities in central government jobs and institutions, though debates continue on whether reservations should be based on economic need rather than religion. The issue remains sensitive, balancing social justice with India's secular principles.

3.1.3.2 Special Schemes for Religious Minorities in India

India has implemented various special schemes for minority communities, focusing on education, economic empowerment, and cultural preservation. Main initiatives are as:

i. Prime Minister's 15-Point Program

❑ Improving lives of minorities

The Prime Minister's 15-Point Program, launched after the Sachar Committee Report, aims to improve the lives of religious minorities in India, particularly Muslims, by focusing on education, economic opportunities, and better living conditions. Major initiatives include making education more accessible through scholarships, improving access to credit for self-employment, and enhancing community infrastructure such as health centers and sanitation. The program's primary goal is to reduce poverty and support economic and social growth in minority communities. Success stories, such as increased enrollment in residential schools, skill centers, and initiatives to boost minority businesses, demonstrate the program's positive impact.

❑ Challenges and limitations of the program

However, the program faces significant challenges that hinder its effectiveness. Slow implementation and delays in launching programs, as well as cases of corruption where funds are misused, have prevented the benefits from reaching the intended communities. Critics also argue that focusing too much on religious minorities could create divisions in society. Moreover, the lack of awareness about the available schemes among targeted

communities further limits the program's reach. Despite these issues, the program has made some positive strides, but more needs to be done to ensure its full potential is realized and that it reaches all those in need.

ii. Maulana Azad Fellowship

❑ Fellowship for minority students

The Maulana Azad National Fellowship is a special scholarship that helps students from minority communities in India, such as Muslims, Sikhs, Christians, Parsis, and Buddhists, who are pursuing higher studies like Ph.D. degree. This fellowship was introduced in 2009 by the Ministry of Minority Affairs and provides financial support for up to five years. To be eligible, students must have passed important exams like the UGC-NET or Joint CSIR-UGC NET exams. The fellowship is available at recognized universities across India, with 756 slots offered each year.

iii. Pre-Matric and Post-Matric Scholarship Schemes

❑ Scholarships support marginalized students from primary to higher education, reducing financial barriers and dropout rates.

The Pre-Matric and Post-Matric Scholarship Schemes in India are affirmative actions designed to improve educational access for marginalized communities, including minorities, Scheduled Castes (SC), and Other Backward Classes (OBC). These scholarships aim to reduce financial barriers and prevent dropouts, ensuring that students from economically disadvantaged families can continue their education. The Pre-Matric Scholarship supports students from Classes I to X with an annual family income below ₹1 lakh, requiring at least 50% marks in the previous exams. It covers school fees, textbooks, and other expenses, with 30% of the scholarships reserved for girls and provisions for students with disabilities. The Post-Matric Scholarship is meant for students from Class XI to PhD, with eligibility criteria of a family income below ₹2 lakh and at least 50% marks. This scheme covers tuition fees and maintenance allowances, further promoting higher education for underprivileged students. Both scholarships play a crucial role in fostering educational equity and ensuring that financial difficulties do not hinder academic progress.

iv. National Means Cum-Merit Scholarship Scheme

The National Means Cum-Merit Scholarship Scheme (NMMSS), launched in 2008, helps talented students from low-income families continue their education from Class IX to



❑ Scholarship for talented low-income students

XII. To be eligible, students need to have a family income of less than ₹3,50,000 per year and score at least 55% in Class VII. The scholarship provides ₹12,000 annually, paid in four installments. Students have to pass a state-level exam, which tests their mental ability and academic skills. However, students from certain schools, like Kendriya Vidyalayas, are not eligible for this scholarship.

❑ Challenges of NMMSS scholarship

While the NMMSS is a great help for students from economically weaker sections, it faces some challenges. Many students do not know about the scholarship, and the application process can be confusing, especially for those in rural areas. Additionally, students sometimes face delays in receiving the scholarship money, which causes stress. There is also a lack of proper monitoring to ensure the funds are used effectively, which makes it hard to measure how well the scholarship is helping students overall. To improve this, better awareness and easier application processes are needed.

❑ Positive impact of NMMSS scholarship

Despite these challenges, the NMMSS has had a positive impact on students' academic performance. By providing financial support, it reduces the number of students who drop out of school and encourages them to continue their studies. Many scholarship recipients report feeling more motivated to do well in school, which helps them perform better academically. This scholarship has also led to more students enrolling in higher education and achieving success in their careers. By helping students overcome financial barriers, the scheme promotes equal opportunities for education and inspires other students in their communities to aim higher.

v. Pradhan Mantri Jan Vikas Karyakram (PMJVK)

❑ Empowering minority communities

The Pradhan Mantri Jan Vikas Karyakram (PMJVK) is a government initiative aimed at improving the lives of minority communities in India through infrastructure development and the provision of essential services such as education, health-care, and skills training. The programme specifically targets areas where minorities make up at least 25% of the population, ensuring that underrepresented communities have access to the resources necessary for growth and development. One of the main features of PMJVK is its focus on empowering women and girls, promoting gender equality within these communities by funding projects that directly benefit them.

❑ Closing resource gaps in underserved regions

❑ Expanded scope and focus on sustainable development

❑ Financial support for minority communities

❑ Eligibility and focus areas for NMDFC loans

To address resource gaps in underserved regions, PMJVK prioritizes infrastructure improvement. The program allocates most of its funds to enhance access to education, healthcare, and skill development, aiming to close disparities in basic services. Areas eligible for funding are selected using data from the 2011 Census, which considers factors like literacy rates and the availability of essential amenities such as drinking water and electricity. This data-driven approach ensures that the program focuses on regions in most need of development, thereby improving the overall quality of life for minority populations.

In its current form, PMJVK has broadened its scope compared to its predecessor, the Multi-sectoral Development Programme (MsDP). The scheme now includes more areas, including Aspirational Districts, and places greater emphasis on building infrastructure in sectors such as education, health, and skill development. The revised program also introduces new categories for project selection, including Minority Concentration District Headquarters. These changes reflect PMJVK's long-term goals of improving socio-economic conditions, fostering sustainable development, and ensuring that minority communities continue to progress and thrive over time.

vi. NMDFC Loan Schemes

The National Minorities Development & Finance Corporation (NMDFC) provides various loan schemes to support minority communities in India. These schemes focus on improving education, creating self-employment opportunities, and boosting small businesses. The Term Loan Scheme offers loans up to ₹30 lakhs for projects, covering 90% of the costs. Men can borrow at an 8% interest rate, while women get a reduced rate of 6%, with repayment in five years. For education, the Educational Loan Scheme provides up to ₹20 lakhs for studying in India and ₹30 lakhs for abroad, with interest rates of 8% for men and 5% for women. Repayment begins five years after course completion. Another scheme, the Micro Financing Scheme, supports Self-Help Groups (SHGs) by offering loans up to ₹1.5 lakhs per member, encouraging small-scale businesses.

To be eligible for NMDFC loans, the applicant must belong to a minority community, be between 18 to 55 years old, and meet specific income criteria. For rural areas, the annual family income should be below ₹98,000, while for urban areas, it should be below ₹1,20,000. The project proposed must be feasible and viable to qualify for the loan. The NMDFC priori-



tizes education loans for professional courses like engineering, medicine, management, and skill development programs that improve employability. They also fund higher studies, such as Ph.D. programs, under the Maulana Azad National Fellowship.

NMDFC loans can be used for a wide range of activities. These include agriculture (like dairy and poultry farming), technical trades (such as electricians and plumbers), small businesses (like shops and vending services), and traditional occupations (like weaving and carpentry). Loans are also available for transport services, including taxis and goods transport vehicles. All projects must be commercially viable and technically feasible to qualify for assistance.

vii. Jiyo Parsi Scheme

The Jiyo Parsi Scheme, launched by the Ministry of Minority Affairs in 2013-14, is a government initiative designed to counter the declining population of the Parsi community in India. The scheme aims to stabilize and increase the Parsi population through three key components: Medical Assistance, Health of the Community, and Advocacy. It offers financial support for infertility treatments, childcare, elderly care, and community awareness programs. By addressing both cultural and biological challenges, the scheme plays a crucial role in preserving the Parsi community's unique cultural heritage and ensuring its future.

Since its inception, the Jiyo Parsi Scheme has seen notable success, particularly in fertility support, which has led to over 400 births. In 2017, the scope of the scheme expanded to include childcare financial support and extend medical assistance from conception to delivery. The scheme's advocacy efforts, such as counseling and seminars, encourage larger families within the community. These combined efforts have contributed to a measurable reversal of the community's demographic decline, with the highest recorded births in 2020 during the pandemic. This holistic approach addresses both biological and socio-cultural factors, effectively aiding in population stabilization.

The Jiyo Parsi Scheme serves as a successful example of targeted state intervention for minority welfare. By focusing on the community's specific needs, such as elderly care and childcare, the program offers a model of inclusive policies that foster diversity and equity in Indian society. It exemplifies how thoughtful affirmative action can contribute to both cultural preserva-

❑ Parsi population preservation scheme

❑ Successful fertility and population stabilization efforts

❑ Targeted state intervention for minority welfare

tion and population stabilization, ensuring the continued vitality of vulnerable communities.

Caste, gender, and religion have shaped Indian society for centuries, often leading to discrimination and inequality. Affirmative action policies, such as reservations in education and jobs, help uplift marginalized communities, including SC, ST, OBC, and religious minorities, ensuring equal opportunities for all. Anti-caste movements, led by figures like Jyotirao Phule, Dr. B.R. Ambedkar, and Periyar, have played a crucial role in challenging caste-based discrimination, while Kerala's social reforms, including the Vaikom Satyagraha and the work of Sree Narayana Guru, have helped break caste barriers. Although significant progress has been made, true equality is still a work in progress, requiring continued efforts in education, awareness, and strong laws to build a society where caste, gender, and religion do not determine a person's future.

Summarised Overview

In this chapter, we discussed the history and development of affirmative action in India, particularly how caste, gender, and religion have influenced policies aimed at promoting equality. Major social movements like the Dalit, Self-Respect, and Satyashodhak Samaj worked tirelessly to combat caste-based inequality. The Channar Revolt (1822–1859) and the Kallumala Samaram (1915) were significant anti-caste movements that challenged oppressive social norms, particularly in Kerala. The Channar Revolt fought against gender and caste discrimination by demanding the right for Nadar women to wear upper-body clothing, while the Kallumala Samaram challenged caste-based clothing restrictions imposed on Dalits, with Pulaya women leading the charge.

The Constitution of India introduced affirmative action through caste-based reservations, ensuring reserved opportunities for marginalized groups, especially for Scheduled Castes (SCs) and Scheduled Tribes (STs). Dr. B.R. Ambedkar played a crucial role in securing these rights for Dalits, supported by constitutional articles like 15 and 17. Gender equality has also been a focus, with government programs like Beti Bachao Beti Padhao aimed at empowering women through education and job opportunities. Policies like the 15-Point Program and Maulana Azad National Fellowship have provided special support to religious minorities, including Muslims, Sikhs, and Christians, improving their social and economic conditions.

While these policies have made progress, challenges like political misuse and the misallocation of resources persist. Despite these hurdles, the ongoing efforts to create a more equal and inclusive society continue to be influenced by movements like the



Channar Revolt and the Kallumala Samaram, inspiring the fight against caste, gender, and religious discrimination.

Self-Assessment Questions

1. What are the main features of India's constitutional provisions for affirmative action?
2. Who were the main leaders of the Dalit movement, and what were their contributions?
3. What was the significance of the Temple Entry Proclamation of 1936?
4. How did the Channar Revolt help fight caste and gender-based discrimination in Kerala?
5. What challenges do affirmative action policies face in addressing economic inequalities?
6. How did the Justice Party influence Tamil Nadu's politics and caste dynamics?
7. What role did education play in the reform agendas of Sree Narayana Guru and Jyotiba Phule?
8. What are some ongoing debates about caste and affirmative action in modern India?

Assignments

1. Identify and discuss the key milestones in the evolution of affirmative action policies in India, highlighting significant reforms and their impact on marginalized communities.
2. Discuss Dr. B.R. Ambedkar's contributions to the Dalit movement and affirmative action, focusing on his fight against caste discrimination and his role in advocating for reservations in education and employment.
3. Analyze the impact of the Self-Respect Movement on caste and gender equality in India. Discuss how it challenged social hierarchies, promoted dignity among marginalized communities, and influenced reforms in caste discrimination and women's rights, providing relevant examples.

4. Explain the Channar Revolt (1822–1859) and discuss how it challenged caste and gender discrimination, focusing on the role of women and the lower castes in fighting for their rights and social equality.
5. Analyze the significance of the Kallumala Samaram in India's anti-caste struggle, focusing on its impact on caste discrimination, gender oppression, and social reform, while comparing it with other contemporary anti-caste movements.
6. Discuss how the Vaikom Satyagraha contributed to anti-caste reforms in Kerala, focusing on its role in challenging caste-based restrictions and promoting social equality.
7. Discuss the welfare schemes in India aimed at promoting gender equality and analyze their effectiveness in empowering women.
8. Discuss the affirmative action policies in India that support religious minorities and analyze their impact on the empowerment of these communities.
9. Examine the criticisms and controversies surrounding affirmative action policies in India.

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU



UNIT 2

Economic Dimension (EWS)

Learning Outcomes

Upon completion this unit, the learner will be able to:

- ▶ explain the concept of economic reservation and its benefits
- ▶ analyze the policies and legal foundations of EWS reservations in India
- ▶ compare the EWS reservation with caste-based reservation systems (SC/ST/OBC)
- ▶ evaluate the regional and state-specific perspectives and implementation challenges of the EWS reservation policy
- ▶ discuss the criticisms and legal interpretations surrounding the EWS reservation

Background

Envisage a race where everyone starts running to reach the finish line. Some runners are healthy, have the best shoes, and eat a big breakfast before the race. But a few runners don't have shoes, didn't get enough food, and are already tired before they even start. Do you think it's fair to expect everyone to finish at the same time? Probably not! That's why we sometimes need rules to make the race fairer, like giving those struggling runners a little head start. In life, some families have enough money to send their kids to the best schools and buy everything they need, while others can't even afford basic things like school fees or books. These families belong to what we call the Economically Weaker Sections (EWS), a group defined by financial difficulties, not caste or community.

Let's take Ritu, for example. Ritu is a smart girl who dreams of becoming a doctor, but her parents are farmers who barely earn enough to buy food. Rani studies hard, but when it's time for college, the fees are way too high. Without help, her dream of becoming a doctor might stay just that—a dream. To support kids like Rani, the government introduced the idea of EWS reservations, which aim to provide them with special opportunities, like giving them a fair chance to catch up in the race.

In 2019, a law was passed to offer 10% of seats in education and jobs to people from EWS families. This is not based on caste or community but on the financial struggles families face. It's like putting those runners who started without shoes on a smoother path so they can compete on more equal footing. In this chapter, we'll explore how this system works, why it was created, and how it's helping people like Rani and her family pursue their dreams.

Keywords

EWS, economic vulnerability, reservations, financial disparities, inclusive development

Discussion

In the modern quest for inclusive development, addressing inequality has become a significant challenge. One of the major steps taken in this direction is the recognition and empowerment of the Economically Weaker Sections in society. EWS refers to individuals or families whose income falls below a specified threshold, making them particularly vulnerable to economic challenges. Unlike reservations based on caste or community, EWS focuses primarily on economic disadvantage, emphasizing the need to uplift those struggling financially, irrespective of their social background.-empowerment of the Economically Weaker Sections

The introduction of EWS reservations in education and employment in India has sparked extensive debates, ranging from its effectiveness in reducing poverty to concerns about its potential to dilute existing affirmative action policies. The 103rd Constitutional Amendment Act of 2019 marked a historic moment in this regard, enabling the provision of 10% reservation for EWS in government jobs and educational institutions. This policy represents a shift towards addressing economic disparities alongside social inequalities.- 103rd Constitutional Amendment Act

In India, the government created a special system to support these people. In 2019, a new rule was made to give 10% of seats in schools, colleges, and government jobs to people from EWS families. This is called EWS reservation. It's different from the reservations given to certain castes or communities.



Instead, this system focuses only on helping people who are struggling financially, no matter which group they belong to.-
different from the reservations given to certain castes

3.2.1 Economic Dimension of Social Exclusion

Economic exclusion happens when certain people or groups are blocked from getting important resources and opportunities, like jobs, fair wages, loans, or access to markets. This means they don't have the same chances as others to earn money, build a good life, or even afford basic needs like food and shelter. Because of this, they often end up living in poverty, facing hunger, homelessness, and being left out of the economy.

❑ Economic exclusion limits opportunities

This kind of exclusion doesn't happen by accident. It is caused by problems like unfair treatment, unequal distribution of resources, and changes in technology or globalization that make things harder for some people. When a group is excluded from participating in the economy, it creates a cycle: poverty keeps them excluded, and being excluded keeps them in poverty. For example, they might not have access to education, decent jobs, or credit, which prevents them from improving their situation. This also hurts the economy as a whole because fewer people can contribute their talents and skills.

❑ Exclusion is caused by inequality and creates a cycle of poverty

Economic exclusion is not just about individuals; it's a larger problem that creates barriers, especially for groups that are already marginalized. By denying opportunities and resources, it traps people in poverty and makes it harder for them to escape, even when the economy grows.

3.2.2 Economic Reservation in India

Economic reservation in India is a policy designed to help people from economically weaker backgrounds, regardless of their caste. This policy was introduced with the 103rd Constitutional Amendment in 2019, which changed certain parts of the Indian Constitution to allow reservations based on income and financial status. Under this policy, people with an annual family income of less than ₹8 lakh and specific property limits can get a 10% reservation in government jobs and educational institutions. This is in addition to the existing reservations for lower castes like Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs).

❑ Economic reservation policy

Relative Poverty-The Party You're Not Invited To

Relative poverty is like being at a big party but not having the same VIP access as everyone else. You might have enough to get by, but when you see people around you enjoying fancy cars, the latest gadgets, and vacations, it feels like you're missing out. People in relative poverty often don't have access to things like quality education, healthcare, or modern amenities. They're not technically "poor," but compared to the average person, they're struggling to keep up. It's like trying to run a race while everyone else is on a fast-track lane!

❑ Goal of economic reservation

The goal of economic reservation is to provide equal opportunities to people who are financially disadvantaged, even if they do not belong to a lower caste. Supporters of the policy argue that it helps reduce poverty and allows more people to access government jobs and education. They believe that by focusing on economic status instead of caste, the policy is more inclusive and gives opportunities to a wider group of people. It also aims to correct the historical neglect of poorer sections of society who were not considered in traditional caste-based reservations.

❑ Criticisms of economic reservation

However, there are also several arguments against economic reservation. Critics believe that it could reduce the benefits for people from historically marginalized groups like SCs, STs, and OBCs, who were the focus of earlier reservation policies. Some argue that this move could weaken efforts to address the social and economic problems faced by these communities. There are also concerns that the policy could violate the principle of equality in the Constitution by focusing only on economic factors instead of considering the historical exclusion of certain groups.

❑ Concerns about inefficiency and fairness

Opponents worry that economic reservations may lead to inefficiency in the education system and government jobs. They fear that prioritizing candidates based on their income could reduce the focus on merit, which might affect the quality of education and services. Another concern is that these reservations could cause divisions in society, leading to resentment from those who do not benefit from the policy. Critics also point out that the new reservations push the total quota beyond the 50% limit set by the Constitution, which could cause fairness issues.

Economic reservation has both strong support and serious opposition. While it aims to help economically disadvantaged people, it also raises important questions about fairness, social justice, and the future of India's reservation policies. The challenge is finding a balance that supports all groups fairly and promotes equal opportunities for everyone.

3.2.3 Regional Perspectives on Economic Reservation in India

Views on economic reservation in India differ from region to region because of local needs, history, and community interests. In Northern India, places like Haryana and Punjab show strong support for economic reservation, especially among the upper castes. People in these states believe that despite being from higher castes, they face economic challenges and should get help through reservations. Uttar Pradesh has also seen protests from upper caste groups who want to be included in the reservation system to improve their job opportunities and economic situation.

❑ Regional support for economic reservation

In Western India, Gujarat and Maharashtra have implemented economic reservations to help the poor. The Patidar community in Gujarat, despite being from an upper caste, has demanded benefits because they believe they face economic hardships. In Maharashtra, the Maratha community has been asking for reservations too, arguing that they need more opportunities for jobs and social upliftment.

❑ Economic reservation demands in Western India

In Southern India, Andhra Pradesh and Telangana have seen movements from communities like the Kapus, who are asking for reservations based on their economic situation. In these states, the politics often mix caste and economic needs. In Tamil Nadu, where caste-based reservations have been a long-standing practice, the introduction of economic reservation has received mixed reactions. Some people think it will help the poor, while others worry it could weaken the benefits already given to those from lower castes.

❑ Mixed reactions in Southern India

In Eastern India, Bihar and West Bengal have ongoing debates about reservation policies. In Bihar, many feel economic reservation is needed to help poor people from all castes. In West Bengal, the focus is still on caste-based reservations, but there is a growing conversation about including people from poor economic backgrounds, even if they are not from a lower caste.

❑ Economic reservation debates in Eastern India

Regional views on economic reservation in India show the complexity of balancing caste identities and economic needs. Some regions push for policies that help all poor people, regardless of caste, while others worry that such policies might reduce the benefits for those from historically disadvantaged groups. The challenge is finding a way to give everyone equal opportunities while also protecting the rights of those who need the most help. -**Regional views on economic reservation**

3.2.4 Economically Weaker Sections

The Economically Weaker Sections (EWS) refer to individuals within the *general category* who are characterized by significant financial disadvantage. Unlike Scheduled Castes (SC), Scheduled Tribes (ST), or Other Backward Classes (OBC), which have historically benefited from state-supported affirmative action policies aimed at addressing entrenched socio-economic disparities, the EWS population has remained outside the purview of such protective mechanisms. The introduction of the EWS category seeks to redress this imbalance by implementing targeted reservations in education, public employment, and other sectors, thereby fostering greater inclusivity within historically unreserved communities.

Economic Backwardness in India: Villages vs. Cities

In India, 70% of people live in rural areas, but they earn only 40% of the country's income. Villages face problems like poor roads, less access to education, and fewer jobs. Meanwhile, cities are growing fast with industries and technology. It's like villages are trying to catch up in a race while cities are speeding ahead!

□ Examples of Economic vulnerability in EWS

Examples of EWS within the Indian context include a Brahmin family in Rajasthan with an annual household income of less than ₹8 lakh and negligible landholdings, or a Kayastha family in Uttar Pradesh grappling with financial barriers to accessing quality education. Similarly, in Kerala, a farmer from the Nair community owning less than 5 acres of agricultural land, or a tuition teacher from a low-income household, may meet the EWS eligibility criteria. These cases underscore the heterogeneity within the general category and the shared economic vulnerabilities that justify the extension of affirmative measures to this group.



❑ Structural economic disadvantages

❑ Cycle of poverty and unemployment

The systemic economic disadvantages faced by EWS individuals can be attributed to several interrelated factors. Foremost among these is a pervasive lack of access to sufficient financial resources, which undermines their ability to secure fundamental needs such as nutrition, healthcare, and education. Compounding this is the historical exclusion of the general category from reservation policies, which has left economically marginalized individuals within this group to compete on equal terms with more privileged cohorts. This structural inequity has been exacerbated by rising costs of living, particularly in urbanized and semi-urbanized regions such as Kerala, where inflationary pressures on education and healthcare disproportionately impact low-income households.

Another critical determinant is the intergenerational transmission of poverty. For instance, families engaged in subsistence agriculture or casual wage labour often lack the means to accumulate capital or invest in long-term developmental outcomes for their children, perpetuating cycles of economic stagnation. And also, chronic unemployment and underemployment are prevalent among EWS individuals, especially in rural areas where labour market opportunities remain limited or mismatched to the skill sets of the workforce. This confluence of factors underscores the need for targeted interventions.

The establishment of the EWS category thus represents an important policy innovation aimed at mitigating systemic inequities. By addressing the economic vulnerabilities of disadvantaged individuals within the general category, the government endeavours to create a more level playing field, facilitating upward mobility and socio-economic integration.

3.2.5 Economically Weaker Section in India

The Economically Weaker Section (EWS) in India is a classification introduced to address economic disadvantages within the general category. It provides a 10% reservation in government jobs and educational institutions for individuals who do not belong to Scheduled Castes (SC), Scheduled Tribes (ST), or Other Backward Classes (OBC) but have a total family income of less than ₹8 lakh annually. This measure ensures that economically disadvantaged individuals from the general category also benefit from affirmative action policies, leveling the playing field in education and employment.

The legal foundation for EWS reservations was laid through the 103rd Constitutional Amendment Act, 2019, which came

❑ 103rd Amendment enables EWS reservations

❑ EWS eligibility criteria

❑ EWS certificate application

❑ EWS reservation benefits

into effect on January 14, 2019. This amendment added provisions to Article 15 and Article 16 of the Constitution, allowing reservations for economically weaker sections beyond the existing 50% reserved for SCs, STs, and OBCs. The introduction of this reservation highlights the government's commitment to addressing financial disparities across all sections of society.

To qualify for EWS benefits, applicants must meet specific criteria. Their total annual family income should be below ₹8 lakh, and their family must not own more than 5 acres of agricultural land. Additionally, residential property limits include flats under 1000 square feet and land below 100 square yards in cities or 200 square yards in rural areas. Some states, such as Kerala, have further refined these criteria based on local socio-economic conditions, setting lower income thresholds like ₹4 lakh per annum.

The process of obtaining an EWS certificate is straightforward. Applicants need to visit their local government offices, such as the Tehsildar or District Magistrate's office, and submit documents like income certificates, Aadhaar cards, proof of land ownership, and domicile certificates. Many states also offer online application services to simplify the process. This certificate serves as proof of eligibility for EWS benefits in education and government jobs.

The introduction of the EWS category is a significant step toward ensuring economic inclusivity in India. By extending reservations to financially weaker individuals in the general category, the policy aims to create equal opportunities in education and employment. However, its implementation across states and its overall impact on reducing economic disparities remain subjects of ongoing debate and scrutiny.

3.2.6 Benefits of EWS Reservation in India

Reservation for Economically Weaker Sections in India helps people who come from economically disadvantaged backgrounds by giving them special opportunities in different areas. In education, those in the EWS category can get a 10% reservation in colleges and universities for undergraduate and postgraduate courses. This helps them access better education that they might not otherwise afford. In government jobs, people from EWS can also get a 10% reservation, making it easier for them to secure positions in various government departments. Additionally, there are housing schemes where EWS



beneficiaries can get priority for affordable housing, allowing them to live in better conditions. They are also eligible for financial assistance programs, such as scholarships and loans, which can help them with education and other needs. These benefits aim to improve the lives of people from economically weaker sections and help them have better opportunities.

3.2.7 Comparison with Caste-based Reservations (SC/ST/OBC)

The Economically Weaker Section (EWS) reservation and reservations for Scheduled Castes (SC), Scheduled Tribes (ST), and Other Backward Classes (OBC) have different goals, even though they all aim to help disadvantaged groups. The EWS reservation, introduced in 2019, focuses on economic criteria. It helps people from the general category with an annual family income below ₹8 lakh and limited assets. On the other hand, SC/ST/OBC reservations are based on social and educational backwardness. They were designed to help communities that have faced discrimination and social disadvantages for generations.

| Aspect | EWS Reservation | SC/ST/OBC Reservation |
|---------------------|---|---|
| Criteria | Based on economic status | Based on social and educational backwardness |
| Quota | 10% (additional to existing reservations) | 50% (15%SC, 7.5% ST, 27% OBC) |
| Legal Basis | Articles 15(6) and 16 (6) | Articles 15 (4), 15 (5), and 16 (4). |
| Focus | Financial disadvantages in general category | Historical marginalization and discrimination |
| Eligibility Overlap | Excludes SC/ST/OBC groups | Inclusive of caste regardless of income |

The percentage of reservation also differs between these groups. EWS provides a 10% quota in government jobs and education, which is in addition to the existing reservations. In con-

❑ EWS vs SC/ST/OBC reservation

❑ EWS based on income, others on caste

❑ EWS legal basis vs SC/ST/OBC

❑ EWS and reservation balance

trast, the SC/ST/OBC reservations are capped at 50%, divided as 15% for SC, 7.5% for ST, and 27% for OBC. This 50% limit was established by the Supreme Court to maintain a balance in the reservation system.

Eligibility criteria also set these reservations apart. EWS eligibility is purely based on financial status and does not consider caste or community. Meanwhile, SC/ST/OBC eligibility is based on caste classifications officially recognized by the government. Importantly, individuals from SC/ST/OBC categories can benefit from their respective reservations even if they are not financially weak, as the focus is on addressing their historical marginalization.

Legally, the two systems have different foundations. The EWS reservation was introduced through the 103rd Constitutional Amendment, which added Articles 15(6) and 16(6) to allow for economic-based reservations. In contrast, SC/ST/OBC reservations were introduced earlier and are supported by Articles 15(4), 15(5), and 16(4) of the Constitution, focusing on social justice and equality. And SC/ST/OBC individuals cannot claim EWS benefits, as the Supreme Court ruled that these groups already receive other reservation benefits. However, this exclusion has sparked debates, with some arguing that poor individuals within SC/ST/OBC groups should also qualify for EWS benefits.

Smart State, But Struggling for Jobs

Kerala is one of the smartest states in India, with high literacy rates and long life expectancies. But here's the twist: even though people are well-educated, many still need to work abroad to earn money. The state relies heavily on money sent back home by people working overseas, which means local businesses and jobs aren't growing as fast.

The introduction of EWS has raised questions about exceeding the 50% reservation limit. However, supporters of EWS argue that it does not take away from existing SC/ST/OBC reservations since it is an additional provision. While EWS focuses on financial disadvantages, SC/ST/OBC reservations address social inequalities rooted in caste discrimination. Together, these systems represent different approaches to achieving fairness and inclusivity in India, but their differences highlight the complex nature of addressing inequality in a diverse society.



As of now, several states in India have chosen not to implement the Economically Weaker Section (EWS) reservation. While the EWS quota is available in many states, it is ultimately up to each state government to decide whether to adopt it.

3.2.8 Economically Weaker Sections In Kerala

In Kerala, the EWS (Economically Weaker Sections) quota has mostly benefited upper-caste groups like the Nair community and Christian communities such as Syro-Malabar Catholics, Orthodox Christians, and others. About 68% of Christians and upper-caste Hindus, who make up around 30% of Kerala's population, are expected to gain from this reservation. Introduced in 2020, the 10% EWS quota is aimed at families with an annual income below ₹4 lakh, and it applies to government jobs and educational institutions. Many forward caste organizations, like the Nair Service Society (NSS) and Kerala Brahmana Sabha, have welcomed this policy.

3.2.9 States Not Implementing EWS Reservation

The state of Tamil Nadu has a unique approach to reservations. It already provides nearly 70% of government jobs and educational seats to SC, ST, and OBC categories, leaving little room for the Economically Weaker Section (EWS) quota. As a result, Tamil Nadu has resisted implementing the EWS quota due to concerns about exceeding the existing reservation limit. Other states that haven't implemented EWS reservations seem to be delaying or reconsidering their decisions because of existing frameworks or political concerns.

❑ Tamil Nadu's stance on EWS

The Supreme Court has clarified that EWS reservations are not mandatory for states. This means states can choose whether or not to adopt the EWS quota, depending on their local needs and policies. While the central government introduced EWS reservations to support economically disadvantaged groups, it gave states the freedom to decide based on their own socio-economic conditions and legislative decisions.

❑ States' choice on EWS

As of January 2025, many states like Andhra Pradesh, Gujarat, Karnataka, and Maharashtra have implemented the EWS quota. However, the approach remains uneven across the country, with some states choosing to adopt it and others, like Tamil Nadu, opting out. This reflects the diversity of reservation policies in India, shaped by the specific needs and challenges of each state.

3.2.10 Eligibility Criteria for EWS Reservations in Different States

❑ EWS qualification criteria

❑ State-specific EWS rules

The Economically Weaker Section (EWS) reservation in India is meant to help families from the general category who are financially disadvantaged. To qualify, the central government has set general rules: the family's annual income must be below ₹8 lakh, they should not own more than 5 acres of farmland, and their house or land must be within certain size limits. For example, they can own a flat smaller than 1,000 square feet or a plot under 100 square yards in cities (or 200 square yards in rural areas). These rules are followed across most states, but some states make adjustments to suit local needs

In Kerala, the family's income must be less than ₹4 lakh, and the land they own should also be smaller: no more than 2.5 acres in villages or smaller plots in towns and cities. Other states, such as Maharashtra, mostly follow the central rules but allow special groups, like the Maratha community, to use the EWS quota too. Many states, including Andhra Pradesh, Bihar, Gujarat, and Rajasthan, stick entirely to the central guidelines without making big changes.

Fear of Missing Out!

FOMO, or the "Fear of Missing Out," is when people feel sad or frustrated because they think others are getting something they want, like a good job or cool things. For people in the Economic Weaker Sections (EWS), this feeling can be even stronger. When they see others having better jobs, more money, or nicer lives, it can make them feel left out and unhappy. This feeling of missing out can make it even harder for them to improve their situation because they feel stuck. So, FOMO isn't just about missing out on fun things—it's also about how it can make people feel worse when they already don't have enough.

It's important to know that the "family" for EWS eligibility includes the applicant, their parents, siblings under 18, their spouse, and children under 18. Applicants must get an EWS certificate by applying through local government offices, and the process may vary slightly by state.



While the central government has provided a standard set of rules for EWS reservations, states like Kerala have made changes to fit their specific socio-economic conditions. This flexibility helps make the EWS system fair and more suited to the needs of people in different parts of India.

3.2.11 Supreme Court's Interpretation and Legal Developments on EWS

☐ Supreme Court upholds EWS reservation

On November 7, 2022, the Supreme Court upheld the 103rd Constitutional Amendment, validating the 10% reservation for Economically Weaker Sections (EWS) in a 3-2 decision. The majority of judges argued that poverty is a valid reason for reservation, even for those not from backward castes, and suggested that the 50% cap on reservations could be flexible. However, the dissenting judges felt that excluding SC, ST, and OBC groups from EWS reservations contradicted the principle of social justice and emphasized that the 50% limit should remain strict to maintain balance. This ruling represents a significant shift in India's affirmative action policy, considering poverty as a new criterion for reservations alongside caste-based criteria.

3.2.12 Criticisms of the EWS Reservation Policy

☐ Criticism of EWS exclusion

The EWS reservation policy has faced significant criticism for being unfair and exclusionary. It specifically excludes SC, ST, and OBC communities from economic-based reservations, even if they are financially weak. This means the policy benefits mainly upper or forward caste groups, which some argue contradicts the idea of social justice. Critics believe it privileges groups that have historically been better off, rather than helping those who have faced deep inequalities for centuries.

☐ EWS policy criticized for breaking reservation limits

Another criticism is that the policy might go against the Indian Constitution. It breaks the 50% limit on total reservations set by the Supreme Court and could undermine the right to equality under Article 14. The ₹8 lakh income limit used to determine eligibility is also seen as arbitrary and not based on solid data. Many feel that the policy lacks proper research and ignores the complex social and economic inequalities that marginalized communities face.

Critics also say the policy changes the original purpose of reservations. Traditionally, reservations were meant to fight discrimination, but this policy focuses on economic hardship alone. Some worry it could lead to caste-based reservations be-

❑ EWS policy shifts reservation purpose

ing reduced or removed in the future. On a practical level, it could create more paperwork and confusion, making it harder for people to get the help they need. Overall, many believe the policy adds extra benefits for already advantaged groups, which goes against the original purpose of helping the most disadvantaged.

In conclusion, the Economic Weaker Section (EWS) quota is an important policy aimed at helping economically disadvantaged groups in India. It provides them with opportunities in education, employment, and other sectors that can help improve their living standards. While the policy has been beneficial in promoting equality, it also raises questions about its fairness and the criteria used to determine eligibility. The EWS quota also plays a vital role in addressing socio-economic disparities, but its implementation and impact need ongoing evaluation to ensure it reaches those who truly need it.

Summarised Overview

In this chapter we explored the concept of economic reservation, emphasizing its role in tackling poverty and marginalization. It introduces the EWS reservation policy, implemented via the 103rd Constitutional Amendment, which provides a 10% quota in education and employment for economically disadvantaged individuals within the general category. The policy's intent is to promote equity by addressing financial vulnerabilities without focusing on caste. Regional perspectives and legal developments are discussed, highlighting variations in implementation and interpretation. Criticisms include concerns about fairness, the exclusion of marginalized groups like SC/ST/OBC, and potential conflicts with constitutional equality principles. Despite its challenges, the policy represents a significant shift in India's approach to reservations, balancing economic needs with historical inequities.

Self-Assessment Questions

1. What is economic exclusion in the context of economic reservation (EWS), and how does it impact society?"
2. What is the significance of the ₹8 lakh income limit for EWS eligibility?
3. How does the EWS reservation differ from caste-based reservation systems?
4. What are the main benefits of the EWS reservation policy in education?



5. Why has the 50% reservation cap been a subject of debate in the context of EWS?
6. Which communities benefit the most from EWS reservations, and why?
7. How do regional perspectives shape the implementation of EWS policies?
8. What are the criticisms of focusing only on economic factors in reservation policies?
9. What role does the 103rd Constitutional Amendment play in shaping reservation policies in India?
10. How does the EWS reservation policy aim to address social and economic inequalities?

Assignments

1. Define Economic Reservation (EWS) and discuss its primary causes in the context of India's socio-economic structure.
2. Explain the provisions of the 103rd Constitutional Amendment regarding EWS reservations and their legal significance.
3. Compare the benefits offered under the EWS reservation policy with those provided for SC, ST, and OBC categories in terms of eligibility, benefits, and implementation.
4. Evaluate the criticisms of the EWS reservation policy, particularly in relation to Article 14 of the Indian Constitution, which ensures equality before the law.
5. Analyze the Supreme Court's interpretation of the EWS reservation policy and its implications on the policy's validity and scope.
6. Identify and discuss the regional differences in the acceptance and implementation of EWS policies across different states in India.
7. How does the EWS reservation policy aim to address the issue of intergenerational poverty cycles in disadvantaged communities?
8. Discuss the role of state-specific adaptations in making the EWS reservations more effective in addressing regional socio-economic disparities.

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SGOU

Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU



UNIT 3

Issue of Representation

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ comprehend the concept of representation and its significance in political, social, and educational contexts
- ▶ analyze different forms of political representation, including descriptive, substantive, and symbolic representation
- ▶ examine the impact of territorial representation on governance and the challenges associated with unequal representation
- ▶ critically assess the structure and functioning of representative democracy, particularly in India, and its implications for political participation

Background

Envisage you're in a classroom where the teacher only calls on a select few students—those who speak the loudest, those from a particular background, or those who fit a certain mold. The rest of the students, though equally capable, never get the chance to voice their thoughts. Over time, they begin to feel invisible, unheard, and unimportant. This, in essence, is the issue of representation—who gets to speak, who gets to be seen, and whose experiences shape the rules of society.

Representation is like a mirror. When you see yourself reflected in political leaders, textbooks, or the media, you feel acknowledged, empowered, and inspired. But when that mirror only shows certain faces, others are left feeling like they don't belong. For example, consider a young girl who dreams of becoming a scientist but never sees women celebrated in science books. She might begin to believe that science is not for her. Similarly, when communities are absent from decision-making processes, their problems remain unheard, leading to policies that don't address their needs.

History is filled with struggles for representation. In colonial India, Indians were ruled by the British without having a say in governance. The demand for self-rule was not just about political control—it was about having leaders who understood the realities of Indian life. Similarly, in many modern democracies, marginalized groups still struggle for fair representation in government. In the United States, the civil rights movement fought for Black representation in politics, education, and employment, challenging centuries of exclusion.

Representation isn't just about numbers; it's about meaningful participation. A parliament full of women, for instance, doesn't guarantee that women's issues will be addressed unless those representatives actively fight for gender equality.

Keywords

Representation, Political Representation, Social Representation, Descriptive Representation, Representative Democracy

Discussion

Representation is a gigantic word, but it's really about something simple: making sure everyone has a voice. In a democracy, representation means that the people we choose as leaders are there to speak up for us and make decisions that help everyone. It's like picking someone to be on your team—they need to understand your ideas and work hard to support them.- Concept of Representation

Abraham Lincoln once said that democracy is "government of the people, by the people, for the people." This means that a government should be made up of people chosen by us, who work for us, and who care about what we need. But making this happen isn't always easy. Questions like, "Who gets to be a leader?" or "How do we make sure everyone is heard?" show how complicated representation can be.

Representation is more than just picking leaders. It's also about making sure those leaders understand the different people they represent. This includes people of different races, genders, backgrounds, and experiences. It's about fairness and making sure everyone has a chance to be included and heard.



In this chapter, we will explore various forms of representation and the challenges associated with ensuring fair and inclusive participation in governance and society.

3.3.1 Understanding Representation

Representation is a multifaceted concept with varied meanings across different domains. In political and legal contexts, it refers to the act of speaking or acting on behalf of a person, group, or constituency. This includes political representation in legislative bodies, legal representation by lawyers, and ensuring the fair inclusion of diverse groups in decision-making processes. By enabling a voice for different constituencies, representation plays a crucial role in fostering inclusivity and accountability in governance and law.

❑ Importance of representation

From a philosophical and artistic perspective, representation involves the use of signs, symbols, or constructs to stand in for something else. It is a fundamental way humans organize and interpret reality, enabling the creation of meaning through linguistic and visual symbols. This process allows for the expression of complex ideas through images, words, or other symbolic forms. Representation in this sense underpins human creativity and the development of shared cultural and intellectual frameworks.

❑ Philosophical view of representation)

Representation encompasses various other meanings, such as a formal statement or description, an image or likeness of something, or a mental concept presented to the mind. The term originates from the Latin *repraesentare*, meaning "to bring before" or "exhibit," reflecting its essential function of standing in for or presenting something. Across all contexts, representation is a crucial tool for understanding, communication, and expression in human society. So we need to look at different types of representations happening around us.

❑ Various meanings of representation

3.3.2 Early Struggles For Representation During Colonial Rule

When the British took full control of India in 1858, many Indians wanted to have a say in how their country was governed. Different groups, including people from different social classes, started asking for political rights. One big step in this struggle was the formation of the Indian National Congress (INC) in 1885. At first, it was mostly made up of upper-class Hindus and Parsis, with very few Muslims. The Congress

❑ Struggle for political rights

wanted peaceful political change and asked for fair treatment of Indians in government jobs and more representation in decision-making. However, it took many years for the Congress to include people from all parts of Indian society.

❑ Economic exploitation by British

Another major issue during British rule was economic exploitation. Leaders like Dadabhai Naoroji spoke out against how British policies were making India poorer. He explained that wealth was being taken from India to Britain, leaving many Indians struggling. The INC started demanding that more of India's resources be used for its own people instead of benefiting the British. This helped Indians realize that they needed to unite and fight for their rights.

❑ Partition of Bengal protests

In 1905, the British decided to divide Bengal, a move that many Indians saw as an attempt to break their unity by separating Hindus and Muslims. This angered many people and led to large protests. The British introduced some reforms, like the Morley-Minto Reforms in 1909, but they didn't give Indians enough power. Many leaders continued to demand more control over their own country.

❑ Peasant and tribal revolts

Apart from political groups like the INC, there were also revolts by peasants and tribal communities who suffered under British rule. One example is the Santhal Rebellion (1855-57), where indigenous groups fought against British exploitation. These uprisings showed that not just educated elites but also ordinary people wanted fairness and representation. The early struggles for political rights laid the foundation for India's independence movement, helping create a future where every Indian would have a voice in running the country.

❑ Citizen participation in governance

3.3.3 Political Representation

Political representation is the process by which citizens' voices, perspectives, and interests are expressed in public policy-making through representatives who act on their behalf. It involves four key components: the representative (an individual, organization, or movement), the constituency being represented, the opinions or interests being advocated, and the political context in which representation occurs. This process ensures that citizens can participate in governance, particularly in modern societies where direct participation is often impractical.

Scholars like Hanna Pitkin have identified different types of representation. Formalistic representation focuses on institutional structures, such as authorization and accountability. De-



❑ Types of political representation

scriptive representation emphasizes representatives mirroring the characteristics of the groups they represent, such as race or gender. Symbolic representation involves representatives being accepted and trusted by the people they represent. And substantive representation refers to actively advocating for constituents' interests and needs. Together, these forms of representation help ensure citizen participation, stability, and continuity in governance by shaping legislation and public policy on behalf of the people.

❑ Descriptive representation in politics

i. Descriptive Representation

Descriptive representation is a concept in politics where elected leaders share similar characteristics, like race, gender, or class, with the people they represent. This means that a person from a certain ethnic group might choose a leader who looks like them or has similar experiences. The idea is that if a leader shares these traits, they might better understand the needs and concerns of the people they represent. Research shows that when people have a representative who shares their identity, they feel more connected and are more likely to get involved in politics, like voting or contacting their leader.

❑ Methods to ensure political representation

Political parties use different methods to make sure that underrepresented groups are included in government. For example, they might create party lists that guarantee candidates from certain groups will be on the ballot, or they may set rules that require a certain number of candidates to come from these groups. Some countries also have quotas, where a certain number of seats in government are saved for these groups. These strategies help ensure that more people feel represented in politics. However, experts like Hanna Fenichel Pitkin believe that it's not just about having leaders who look like the people, but also about how well those leaders represent the interests of everyone, no matter their background.

❑ Substantive representation in politics

ii. Substantive Representation

Substantive representation is about elected leaders actually working to meet the needs and wants of the people they represent. Instead of just looking like the people or having similar characteristics, these leaders actively listen to what their constituents want and take action to make those things happen. This includes making laws, providing services, and overseeing government programs that affect their communities. It's all

about taking real steps to improve the lives of the people who voted for them.

❑ Active engagement in substantive representation

This type of representation goes beyond simply being a voice for the people; it's about understanding their needs, fighting for their interests, and making decisions that will help them. Representatives who practice substantive representation don't just wait for people to tell them what to do—they also work to understand those needs and actively try to solve problems. It's a dynamic process where leaders make choices based on what will benefit the people, and they make sure that the government listens to the people's voices. Substantive representation helps ensure that the government truly works for its citizens, rather than just reflecting their demographics.

❑ Descriptive boosts substantive representation

Descriptive representation can enhance substantive representation by allowing representatives who share common experiences with their constituents, especially from minority groups, to better understand and address their needs. This shared background fosters a deeper connection and helps advocates create policies that benefit their communities. The sense of "linked fate," where the success of one individual is tied to the group, motivates representatives to act in the best interest of their people. Representatives with similar backgrounds often feel a responsibility to tackle the unique challenges their community faces, serving as role models and increasing political trust and participation. The relationship between descriptive and substantive representation is shaped by personal connections, motivations, and political context, leading to more active advocacy for marginalized groups.

Tribal Representation in India

India's tribal population, making up about 8% of the country, often faces challenges in getting fair representation in government and policies. Even though there are provisions for tribal communities, they still struggle with issues like land rights and access to education. It's like being invited to the table but not getting enough to eat!

iii. Symbolic Representation

Symbolic representation refers to the use of symbols to stand for ideas, beliefs, or entities beyond their literal meaning,



❑ Symbolic representation in politics

❑ Symbolic representation in psychology and literature

❑ The interconnectedness of descriptive, substantive, and symbolic representation

enabling people to understand and communicate complex concepts. In politics, it shows how the presence of underrepresented groups in elected office can shift public perceptions and challenge stereotypes about their role in decision-making. This symbolic presence not only legitimizes these groups' participation but also inspires broader societal acceptance and inclusion, demonstrating that diverse voices have a rightful place in shaping governance.

Beyond politics, symbolic representation plays a crucial role in psychology and literature. Psychologically, it helps individuals process abstract ideas by mentally encoding experiences and objects through symbols, like language. In literature, symbolism uses people, objects, or colours to convey profound meanings—such as a dove symbolizing peace, or seasons representing life's stages, like spring for rebirth and winter for endings. By creating emotional connections and enhancing understanding, symbolic representation bridges the gap between the tangible and the abstract, offering a powerful tool for communication and meaning-making in all aspects of life

The Power of Society in Shaping Identity

Louis Althusser, famous political thinker believed that our identity and roles in society aren't something we're born with, but shaped by society through things like schools, media, and family. He called this process "hailing," where society gives us labels like "student" or "worker," making us see ourselves in those roles. While these systems feel natural, Althusser argued they aren't permanent and can be challenged, offering a chance for change, especially when people fight together for better conditions.

Descriptive, substantive, and symbolic representation are interconnected in ensuring effective representation. Descriptive representation shows the importance of shared characteristics like race, gender, or ethnicity between representatives and their constituents. Substantive representation focuses on actionable advocacy, ensuring representatives meet the needs and interests of their people. Symbolic representation emphasizes the societal impact of visible diversity in political spaces, challenging stereotypes and legitimizing the inclusion of underrepresented

groups. Together, these forms create a more inclusive, responsive, and representative political system.

3.3.4 Social Representation

❑ Social representation explains collective knowledge and shared beliefs within communities.

❑ Social representations evolve through anchoring and objectifying.

Social representation is a concept in social psychology that explains how communities collectively create, share, and maintain knowledge, beliefs, and practices about social objects. Coined by Serge Moscovici in 1961, it shows the collective elaboration of ideas and values that help individuals navigate their social and material world. These shared representations establish social order and enable communication within groups through common codes of understanding.

Social representations are dynamic systems shaped by interaction and cultural change. Two key mechanisms drive their development: anchoring, which connects new or unfamiliar concepts to existing knowledge, and objectifying, which transforms abstract ideas into tangible and relatable forms. By reflecting emotions, attitudes, and judgments, these representations evolve over time, operating across communities and smaller subgroups, offering a holistic way of understanding the world.

Social representations are always changing as people communicate, share ideas, and respond to new situations. They adapt through conversations, media, and social interactions. Conflicts, new information, and different opinions also help shape these representations, making them more relevant to the current world.

3.3.5 Educational Representation

❑ Importance of educational representation

Educational representation plays a vital role in fostering an inclusive and supportive learning environment. When students see themselves reflected in classroom materials, curricula, and educational resources, their sense of belonging and motivation significantly improves. Research shows that students who feel represented are seven times more likely to feel motivated in their learning environment. This representation boosts their confidence, academic engagement, and overall connection to their educational experience.

Representation in education goes beyond race and ethnicity to include culture, gender, sexual orientation, socioeconomic status, physical and mental abilities, and religious beliefs. By promoting diversity and equity, educational institutions help students develop cognitive empathy, learn about different com-



❑ Importance of diverse representation in education

munities, and gain a sense of agency. Educators can support this by diversifying teaching resources, creating inclusive curricula, encouraging open discussions about diversity, providing counseling support, and implementing clear intervention policies. These efforts not only enhance learning outcomes but also prepare students to thrive in a diverse and interconnected world.

❑ Territorial representation and its role in democratic governance

3.3.6 Territorial Representation

Territorial representation is a system where representatives are elected from specific geographic areas, known as constituencies, to ensure that local interests are prioritized. This system is a cornerstone of democratic governance, widely used in countries like India. Unlike functional representation, which is based on social or economic groups, territorial representation ensures accountability to local constituents. In India, Articles 81 and 170 of the Constitution guide this process, mandating that seats in the Lok Sabha and State Assemblies are allocated proportionally based on population. The delimitation process, which redraws constituency boundaries using census data, plays a critical role in maintaining this balance.

Gender Gap in Political Representation in India

In India, women make up about 48% of the population, but they hold only about 14-15% of the seats in Parliament. This shows a significant gender gap in political representation. Even though women are crucial to the country's progress, they remain underrepresented in decision-making roles. It's like having a team where half the players are sidelined, missing out on their chance to lead and contribute fully!

❑ Challenges and need for reforms in territorial representation

Despite its advantages, territorial representation faces challenges, particularly due to unequal population growth across regions. In India, amendments in 1976 and 2002 delayed adjustments to constituency boundaries, leading to concerns about unequal representation between northern and southern states. These demographic disparities can shift political power and influence electoral outcomes. Critics have suggested that, alongside population data, factors like states' efforts in population control and socio-economic development should be

considered to create a more balanced system. Addressing these challenges through reforms can ensure fairer representation and strengthen democratic principles.

3.3.7 Representative Democracy

Representative democracy is a system where people choose leaders through elections to make decisions and pass laws on their behalf. Instead of everyone voting on every issue, like in a direct democracy, citizens rely on elected representatives to act in their best interests. These representatives are expected to listen to the needs of the people they serve while making laws and policies. This system is built on key ideas like fair elections, the rule of law, and accountability, which help ensure that leaders remain responsible to the public.

☐ Representative democracy system

☐ Roots of representative democracy

☐ Different representative democracy systems

☐ Strengths and challenges of representative democracy

The idea of representative democracy has roots in ancient Athens but became more common in its modern form during the 18th century. In the United States, the Constitution of 1787 allowed citizens to elect members of Congress, marking a major step forward for this system. Similarly, France adopted representative governance in 1792 with the National Convention, which allowed universal male voting. These developments helped shape how democracies work today.

Representative democracies can look different in various countries. In some places, like the UK, the government operates under a parliamentary system where elected members of parliament hold most of the power. In others, like the United States, a presidential system separates the powers of the president and the legislature. Some countries, like France, use a semi-presidential system that mixes the two approaches. Despite these differences, elections are a shared foundation for all representative democracies, helping to ensure citizens' voices are heard.

This system has both strengths and challenges. On the positive side, representative democracy allows for efficient decision-making and stability while still reflecting public opinions through elections. However, it can also face problems, such as representatives not always acting in line with the people's needs, risks of corruption, or people feeling disconnected from the process, leading to low voter turnout. Despite these issues, representative democracy remains a widely used and valued way of governing, as it aims to balance citizen participation with effective leadership.



3.3.8 Representative Democracy in India

❑ India's parliamentary representative democracy

❑ Indian Parliament structure and local governance

India follows a system called parliamentary representative democracy, where people vote to elect leaders who make decisions for them. This system is special because it works in a country with so many languages, cultures, and traditions, making India's democracy one of the most diverse in the world. The government is divided into three parts: the Parliament, which makes laws; the executive branch, led by the Prime Minister; and the state and local governments, which handle local issues.

The Indian Parliament has two parts: the Lok Sabha, or House of the People, where 543 members are elected directly by citizens every five years, and the Rajya Sabha, or Council of States, where members are chosen by state governments or appointed by the President. At the state level, people elect members to their local assemblies, and in villages and towns, local self-governing bodies give people a say in decisions that affect their communities. Everyone over 18 years old can vote, which ensures fairness and equality for all.

India's democracy faces challenges too. Sometimes, political groups don't work well together, making it harder to get things done. There are also worries about people not voting as much as they should and concerns about how political leaders sometimes forget their responsibility to protect democratic values. Even with these issues, India's democracy continues to grow and adapt, striving to include everyone and improve how it works.

3.3.10 Issues of Representation

In India, the issue of fair representation in politics is a critical concern that affects the country's democracy. Over time, several challenges have emerged that hinder the full participation of all groups in the political process. These challenges include political polarization, electoral integrity issues, socio-economic inequalities, casteism, communalism, criminalization of politics, gender representation, and malapportionment. Each of these factors plays a role in creating an uneven playing field, where some voices are louder and more powerful than others. To strengthen India's democracy, it is important to address these issues, ensuring that all communities, regardless of their background, have an equal opportunity to participate and influence the country's governance. This is essential for building a fair and inclusive system where everyone's rights and needs are represented.

i. Political Polarisation and Partisanship

❑ Political polarization and its impact on democracy in India

Political polarization and partisanship in India have intensified in recent years, creating a deeply divided political landscape where opposing viewpoints are often disregarded, and dissent is frequently suppressed. As political parties become more entrenched in their ideologies, meaningful dialogue and debate in Parliament have diminished. This ideological divide stifles collaboration and undermines the role of the opposition, limiting the diversity of perspectives needed for healthy democratic discourse. The lack of constructive debate and the silencing of dissent not only weakens the democratic process but also compromises the effectiveness of governance, as it reduces the opportunity for balanced decision-making that reflects the will and needs of the broader population.

ii. Electoral Integrity and Bias

❑ Concerns over electoral integrity and transparency in India

Electoral integrity in India has come under scrutiny, with concerns about the impartiality of the Election Commission. There have been allegations of bias towards the ruling party, which raise questions about the fairness and credibility of the electoral process. The introduction of electoral bonds has made it more difficult to track political donations, creating an environment where undisclosed funding can disproportionately influence elections. This lack of transparency in political financing further undermines the integrity of the electoral system. And the politicization of law enforcement and the judiciary has raised concerns about the protection of due process rights, particularly for government critics. These factors combined can erode public trust in the democratic system and hinder genuine political competition.

iii. Socio-Economic Inequalities

❑ Socio-economic inequalities hinder fair representation in India

Socio-economic inequalities in India contribute to a lack of fair representation, particularly among marginalized communities. Around 35% of the population lives in poverty, and systemic discrimination based on caste and religion still exists. While there are efforts to reserve seats in legislative bodies for Scheduled Castes (SCs), Scheduled Tribes (STs), and women, these communities continue to face challenges in gaining adequate representation. The persistence of these disparities undermines the principle of equal representation, as many individuals from disadvantaged groups remain excluded from



political power. Addressing these socio-economic inequalities is essential for ensuring a more inclusive and representative democracy.

iv. Casteism and Communalism

Casteism and communalism remain major challenges in Indian politics. Caste-based politics often shapes voting behaviour and political alliances, as people may vote based on their caste identity rather than their beliefs or policies. This exploitation of caste for electoral benefits deepens divisions in society and prevents the growth of unity. Similarly, communalism, or the politicization of religion, has led to rising tensions between different religious groups. Religious fundamentalism, fueled by political agendas, undermines social harmony and threatens the democratic values that bind the country together. These issues highlight the need for inclusive politics that transcends caste and religion, promoting equality and peace for all citizens.

❑ Casteism and communalism divide Indian politics, hindering unity and democratic values

Becoming a Woman- It's All in Society's Hands!

Simone de Beauvoir famously said, "*One is not born, but rather becomes, a woman.*" This means that being a woman isn't just about biology—it's shaped by society. From birth, we're taught how to act, dress, and think based on our gender, and these social expectations mold who we become. So, our gender identity is more about the roles society assigns us than any natural instinct.

v. Criminalization of Politics

The presence of candidates with criminal backgrounds in politics is a serious issue in India. Many elected representatives have criminal charges against them, which raises concerns about the quality of governance. When people with criminal histories hold power, it can damage public trust and make it harder for citizens to believe that their leaders are working for the common good. This criminalization of politics also makes it harder to maintain high ethical standards in government, as the focus might shift away from public service to personal interests. The issue points to the need for stricter laws and regulations to ensure that elected officials meet certain moral and legal standards.

❑ Criminal backgrounds in politics undermine governance

vi. Gender Representation

❑ Women's political underrepresentation

In India, women make up about half of the population, but their representation in political offices is still very low. Right now, women hold less than 10% of the seats in Parliament and state assemblies, showing a big gap between the number of women in the country and their involvement in politics. This lack of representation makes it harder for women's voices to be heard when important decisions are being made. One of the main reasons for this gap is the delay in passing the Women's Reservation Bill, which aims to reserve a certain percentage of seats for women in Parliament and state assemblies. The ongoing struggle to pass this bill highlights the challenges India faces in achieving gender equality in political leadership.

vii. Malapportionment

❑ Malapportionment and unfair representation

Malapportionment happens when some areas have more voters than others, but the same number of representatives, making some people's votes count more than others. This imbalance often arises when parliamentary seats aren't reallocated to match changing populations. For example, in India, certain regions are overrepresented, while others are underrepresented because the boundaries of constituencies haven't been adjusted to reflect population shifts. This causes unfairness in the system, as some areas have more influence over decisions than they should, and others have less.

❑ Unequal voter representation

This issue can also occur due to factors like lower voter turnout in some areas, which can change the effectiveness of each vote. In countries like India, larger states with more people may have fewer representatives than smaller ones, making the system even more unequal. When certain regions are overrepresented, they get more attention and resources, while underrepresented areas are often neglected, which can slow down their economic growth. The failure to fix this problem not only affects the fairness of elections but also worsens regional inequalities within India's federal system.

3.3.10 Importance of fair representation for marginalized and excluded groups

Fair representation for marginalized and excluded groups in India is very important for ensuring justice, equality, and a fair government. These groups include Scheduled Castes (SCs),



❑ Fair representation for marginalized groups

❑ Importance of political representation for marginalized groups

❑ Representation leads to fairer, inclusive policies

Scheduled Tribes (STs), Other Backward Classes (OBCs), women, and religious minorities, who have historically been left out of decision-making processes. The Indian government has created special provisions in the Constitution to correct these past wrongs, like giving reserved seats in legislatures and educational institutions to these communities. These actions are meant to help these groups get better opportunities and have a voice in politics.

Having representatives from these communities in the government allows them to speak up about the issues they face, such as poverty, discrimination, and lack of access to education or healthcare. For example, reserved seats in the Lok Sabha (India's Parliament) make sure that SCs and STs have a say in laws that affect them. Even though there are efforts to increase their political participation, some communities still struggle to have enough political awareness or leadership. Still, fair representation allows them to fight for their rights and needs, and this is crucial for social justice in India.

Fair representation also helps in making laws and policies that are more fair and inclusive. When people from marginalized communities are part of the decision-making process, they can bring new perspectives. For example, laws that address caste discrimination or provide better healthcare for all become stronger when those who are affected by these issues are involved in creating them. There are worries that marginalized groups, like Muslims, are getting less representation in recent years, which could make them feel excluded. Ensuring that these groups are properly represented is crucial to keep India's democracy strong and to prevent any group from being treated unfairly.

Having fair representation helps empower these communities. When people see others like them in leadership positions, it builds confidence and encourages them to participate in government and community life. This makes people more aware of their rights and helps them stand up for themselves and others. In the end, fair representation is not just about following the law, but about making sure everyone's voice is heard and that all citizens, regardless of their background, are treated equally.

In conclusion, representation is a powerful tool that shapes how people see the world and themselves. It affects everyone—whether through media, politics, or social institutions—and plays a key role in forming our identities and understanding of others. Unfortunately, many groups have been underrepresent-

ed or misrepresented, leading to stereotypes and unequal treatment. It's important to ensure that all voices, especially those of marginalized groups, are heard and fairly represented. By doing this, we can create a society that values diversity and promotes equality for everyone.

Summarised Overview

Representation plays a crucial role in various domains, from politics and law to social structures, education, and democracy. It ensures inclusivity, accountability, and the fair participation of diverse groups in decision-making. Political representation, as discussed by scholars like Hanna Pitkin, includes descriptive, substantive, and symbolic representation, each addressing different aspects of how representatives function. Social representation, developed by Serge Moscovici, highlights how shared knowledge and beliefs shape societies. Educational representation emphasizes diversity in curricula and materials to foster inclusive learning environments. Territorial representation focuses on local interests in governance, while representative democracy ensures citizens' voices are heard through elected leaders. The chapter also explores India's struggles for representation under colonial rule and its modern parliamentary democracy. These discussions provide a deeper understanding of how representation impacts governance, social dynamics, and identity formation.

Self-Assessment Questions

1. What are the major components of political representation?
2. How does symbolic representation influence public perceptions of governance?
3. Why is substantive representation important in political decision-making?
4. What is the relationship between descriptive representation and substantive representation?
5. How do social representations evolve over time?
6. What strategies can educational institutions use to enhance representation in curricula?
7. Why is territorial representation considered essential in democratic governance?
8. What role did the Indian National Congress play in early struggles for political representation?
9. How does India's system of parliamentary democracy ensure political representation?
10. What are some potential reforms to improve territorial representation in India?



Assignments

1. Discuss the different meanings of representation across various domains, including politics, philosophy, and art.
2. Explain Hanna Pitkin's classification of political representation and its relevance in modern governance.
3. How does descriptive representation impact political engagement and participation among underrepresented groups?
4. Compare and contrast descriptive and substantive representation. How does one influence the other?
5. Explain the concept of social representation according to Serge Moscovici. How does it shape societal norms?
6. Assess the role of educational representation in fostering inclusivity and equity in learning environments.
7. What are the advantages and challenges of territorial representation in democratic governance?
8. Discuss the early struggles for political representation in colonial India and their impact on India's independence movement.
9. Compare the different types of representative democracies worldwide and their strengths and weaknesses.
10. Critically evaluate India's parliamentary representative democracy and its effectiveness in representing its diverse population.

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Suggested Reading

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU

BLOCK 4

Social Exclusion: Emerging Trends



UNIT 1

Migrants

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ comprehend what migration is, why people move, the types of migration, and how it affects individuals and societies
- ▶ explore the difficulties migrants face, like discrimination, lack of resources, and feeling left out
- ▶ learn how migration changes people's identities and how they adapt to new cultures while staying connected to their roots
- ▶ evaluate real life examples like the Rohingya crisis, Syrian refugees, and migrant workers in India to understand their struggles and contributions

Background

Migration is often seen as a journey—a physical movement from one place to another, driven by the pursuit of better opportunities, safety, or survival. Yet, beneath this surface, migration is deeply intertwined with stories of struggle, resilience, and unfulfilled hopes. Migrants, much like a powerful river that carves its path through mountains and plains, bring with them dreams of a better life, yet often find themselves facing unseen barriers that prevent them from fully integrating into their new environments.

Consider Rajesh, a farmer from a drought-stricken village in India. When the rains ceased and his fields turned into barren wastelands, his aspirations for a better future withered alongside his crops. Left with no choice, he packed his belongings into a cloth bundle, bid farewell to his aging parents, and boarded a train to Mumbai. In the city, amidst the gleaming skyscrapers, he became invisible—an anonymous laborer building homes he could never enter, longing for a place that would truly welcome him.

Then there is Fatima, a young Syrian mother who braved perilous seas with her daughter, fleeing the violence that consumed her homeland. The promise of refuge became a harsh reality in a distant camp, where she was reduced to a statistic—a figure on a report rather than a person with a past and a future. Fatima’s courage is a testament to the human spirit’s ability to persevere, even when the world sees migrants as burdens rather than as contributors to shared progress.

Social exclusion for migrants is like an invisible wall—ever-present but often unnoticed—separating them from the rights, opportunities, and dignity they deserve. Despite their monumental struggles, migrants’ contributions are seldom celebrated; they remain relegated to the periphery of global narratives, their labour acknowledged only in hushed tones as the world thrives on their efforts. Migration is not just the movement of people; it serves as a lens through which we can view the deep cracks in our social systems, highlighting the persistent inequalities and the urgent need for a more inclusive and compassionate society.

Keywords

Migrants, Migration, Social Exclusion, Identity, Belonging, Economic Marginalization, Refugees

Discussion

Migration has been a universal phenomenon, often fueled by dreams of a better life, the pursuit of safety, or the promise of new opportunities. However, the journey of migrants is seldom smooth, as they frequently encounter social exclusion in their adopted societies. This exclusion manifests in various forms, including discrimination, cultural marginalization, and restricted access to essential resources. This chapter explores the concept of social exclusion as it pertains to migrants, investigating its root causes, consequences, and broader societal implications.

The historical narrative of migration has often been intertwined with aspirations for transformation. A compelling reflection of this is found in Charles Dickens' *Great Expectations*. In the novel, Australia serves as a metaphor for hope and renewal, epitomizing the European vision of a future filled with promise and reinvention. During the 19th century, Australia was imagined by many Europeans as a land of opportunity, offering a fresh start or redemption for those willing to embrace the un-



known. Main character Pip's yearning for success and change reflects the universal migrant aspiration, yet Dickens masterfully illustrates the challenges and contradictions that often accompany such dreams.

This chapter explores how migration shapes human experiences, blending aspirations for better lives with the realities of social exclusion. By examining historical and contemporary cases, we highlight the tension between hope and alienation and the complex links between migrant identity, rights, and access to opportunities.

4.1.1 Migrants

A migrant is someone who moves from one place to another, either within their own country or to a different country, and usually stays for a year or longer. People decide to migrate for many different reasons. They might want to find a better job, go to school, be with their family, or escape from difficult situations like poverty or unsafe living conditions. Unlike refugees, who are forced to leave because of war or danger and need protection, most migrants choose to move in hopes of improving their lives. Although the term "migrant" doesn't have one exact definition, it's often used to describe anyone who moves to another place for personal, social, or economic reasons. However, migrants can sometimes face challenges when they arrive in their new homes. They might be treated unfairly or feel left out because of where they come from or how they look. This can make it harder for them to fit in, find jobs, or access basic services, which can lead to social exclusion-feeling like they don't belong.

❑ Migrants face challenges

4.1.2 Migration

Migration is the act of moving from one place to another, whether within the same country or across different countries. People migrate for many reasons, like searching for better work opportunities, escaping difficult living conditions, or reuniting with family. Sometimes, people migrate because of things beyond their control, such as natural disasters like floods or droughts, or because of unsafe conditions like war or violence.

❑ Reasons for migration

While migration is something that has always happened throughout history, it can also bring challenges. When people move to a new place, they might not speak the same language,

❑ Migration brings challenges

follow the same customs, or understand the local rules. Because of this, migrants may face discrimination, where people treat them differently or unfairly just because they're new. This can make it hard for migrants to be included in the community and access opportunities like jobs, education, or even just make new friends. These experiences can lead to feelings of being excluded or isolated from the rest of society.

The Pilgrim Fathers- Migrants Seeking Freedom

Pilgrim Fathers were the first people to migrate to America in search of a better life. They left England because they weren't allowed to practice their religion freely. Like many migrants today, they dreamed of a fresh start and a place where they could live without fear. Their journey shows that the desire for freedom and a better future has always been a big reason why people move to new lands.

4.1.3 Historical Origins of Migration

❑ Early migration driven by survival

Migration has been a fundamental part of human history, shaped by the need for survival, societal changes, and economic opportunities. Early human migrations were primarily driven by survival necessities such as changing climates, food shortages, and the need to explore new territories. For instance, the Austronesian peoples migrated from South China to Taiwan around 8,000 years ago, while the Indo-Aryans moved to the Ganges River plain between 1700-1300 BCE. Seasonal migrations for hunting, agriculture, and trade were common across Africa and Asia, illustrating the adaptive strategies humans employed to navigate environmental challenges.

❑ Migration shaped by economic and political forces

As time passed, migration patterns evolved, influenced by economic and political forces rather than just survival needs. The colonial and industrial eras significantly altered migration, with European colonization starting in the 1500s leading to large-scale settlements in the Americas, Australia, and New Zealand, forever reshaping global demographics. Similarly, industrialization globalized labour markets, prompting massive population movements in search of work and better living conditions. This era also saw the emergence of forced migrations, such as the Atlantic slave trade, which reshaped labour sys-



tems and societies worldwide, highlighting that migration was no longer merely a matter of survival but also of economic advancement in a global system.

Building on this historical shift, modern migration trends are increasingly driven by economic opportunities and global interconnectedness. Today, most migrants come from middle-income countries seeking better prospects, improved living conditions, and a higher quality of life in high-income nations. This reflects a broader global trend where migration serves as a tool for personal and collective advancement within a highly interconnected world economy. While the roots of migration still lie in economic necessity, the nature of migration has become more complex, driven by both opportunities and challenges in the globalized world.

❑ Modern migration driven by economic opportunities and global interconnectedness

However, the trajectory of migration patterns is not just shaped by the modern economic system but also by ancient transformations in human societies. The Neolithic Revolution marked a pivotal change in early migration patterns by transitioning human societies from nomadic to settled lifestyles. With the development of agriculture, humans were able to produce food consistently, fostering stable communities and enabling population growth. As food surpluses supported larger populations, early agricultural societies began migrating to new regions. For example, Neolithic communities moved from the Aegean to mainland Greece during the 7th millennium BCE, spreading across the Mediterranean and adapting farming techniques to different environments. These migrations were deeply linked to the spread of agricultural knowledge and practices, which transformed the way societies interacted with their environments.

❑ Early migration shaped by agriculture and the Neolithic Revolution

In addition to economic and technological shifts, the Neolithic Revolution also triggered significant social changes. As societies grew from small villages into larger urban centers, social complexity increased, with new specialized roles emerging. This period created greater opportunities for cultural exchange, as migrating communities interacted, shared ideas, and innovated. These interactions reshaped social structures and mobility, highlighting that migration during the Neolithic era was not just a response to survival needs but a critical factor in the development of human societies. This transformation laid the foundation for the dynamic migration patterns that have shaped human history, evolving from the Neolithic to the modern age.

❑ Neolithic migration fueled social complexity and cultural exchange

Canaan – A Migrant’s Journey of Faith

Did you know that the story of Canaan in the Bible is one of the earliest accounts of migration driven by hope and divine promise? Known as the "Land of Milk and Honey," Canaan was promised by God to Abraham and his descendants as a place of freedom and prosperity. After centuries of slavery in Egypt, the Israelites embarked on a 40-year journey through the wilderness, led by Moses and later Joshua, to reach this land. Their migration wasn't just about finding a new home—it symbolized faith, resilience, and the enduring human quest for a better future.

4.1.4 Types of Migration

Migration can happen in many different ways, depending on where people are moving and why. There are different types of migration, each with its own reasons and effects on the people who move and the places they go to.

i. International migration

International migration refers to the movement of individuals across national borders to establish a new place of residence. It can be categorized into permanent migration, where people settle in a new country for the long term, and temporary migration, typically for specific purposes such as work or education. People migrate internationally for a variety of reasons, including seeking economic opportunities, pursuing educational advancement, reuniting with family, escaping conflict or persecution, and responding to natural disasters or climate change.

This process is influenced by global factors like economic globalization, technological progress, and demographic changes. International migration often involves crossing state boundaries, which can impact both the origin and destination countries in complex ways. Interestingly, migration tends to be an urban phenomenon, with people more frequently moving between cities rather than rural areas. As such, the dynamics of international migration play a significant role in shaping urban landscapes and global economies.

❑ Reasons for international migration

❑ Global factors shape urban migration patterns



ii. Internal migration

- ❑ Internal migration driven by economic opportunities and urbanization

- ❑ Internal migration shapes urban growth and influences international migration

Internal migration refers to the movement of people within a single country, typically from one region to another. This type of migration often involves a shift from rural to urban areas, a process known as urbanization. Other forms of internal migration include urban-to-urban relocation, urban-to-rural movement, and regional shifts within the country. People migrate internally for various reasons, including the pursuit of better economic opportunities, employment prospects, educational advancement, improved living conditions, and family reunification.

Internal migration plays a critical role in shaping the demographic and economic landscape of a country. Cities are the primary destinations for migrants due to the availability of jobs, advanced infrastructure, and more diverse economic opportunities. This movement often contributes to the growth of urban areas while influencing rural regions in terms of population decline or shifts. Importantly, internal migration often serves as a precursor to international migration, as individuals with experience moving within their country are more likely to consider migration across national borders. Therefore, understanding internal migration is essential to grasp the broader patterns of migration and its implications for both urban and rural development.

iii. Voluntary Migration

- ❑ Voluntary migration driven by personal goals and opportunities

Voluntary migration is the process where individuals choose to move from one place to another based on personal desires and goals, driven by factors like better economic opportunities, improved educational access, or an overall better quality of life. It is initiated by personal choice rather than external threats, and can involve various forms like transnational migration, rural-to-urban migration, and guest worker programs. People decide to migrate voluntarily due to push factors, which are negative aspects of their current situation, such as limited job opportunities, inadequate services, or poor living conditions. These factors create a desire for better prospects elsewhere, and are often balanced by pull factors, like higher wages and better employment prospects in the destination area. Voluntary migration reflects the human drive for improvement, where individuals strategically navigate global economic and social landscapes to enhance their lives.

iv. Involuntary Migration

Involuntary migration occurs when people are forced to leave their homes due to circumstances beyond their control, such as war, violence, persecution, or natural disasters. Unlike voluntary migration, which is a choice to seek better opportunities, involuntary migration happens out of necessity to escape danger. Common causes include armed conflicts, human rights violations, ethnic or religious persecution, and disasters like floods, earthquakes, or climate change. In 2023, millions were displaced worldwide, with large numbers in countries such as Syria, Afghanistan, South Sudan, and Myanmar. About 46.9 million were forced to move within their own country, and 26.4 million were displaced due to disasters. This type of migration is driven by the urgent need to survive, making it a critical global concern.

- ❑ Involuntary migration driven by survival and crisis

v. Permanent Migration

Permanent migration is when people move to a new place for the long term or even for the rest of their lives, with the goal of settling there. This type of migration is a big decision and involves careful planning because it requires significant effort and resources, and is often irreversible. People may decide to permanently move for reasons like better jobs, better living conditions, education, or to be with family. Unlike temporary migration, which is usually for a set time, permanent migration involves thinking about the future, including career opportunities and how well someone can fit into their new home. It's a decision that often requires a lot of thought and preparation.

- ❑ Permanent migration involves long-term relocation for better opportunities

vi. Temporary Migration

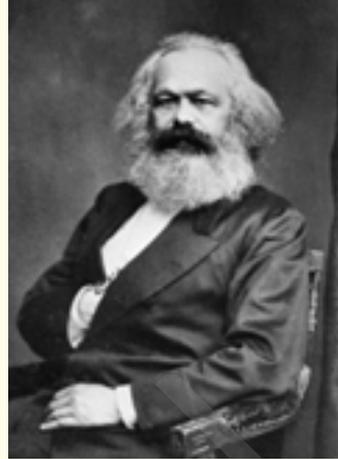
Temporary migration refers to the movement of individuals to another location for a limited time, with the intention of returning to their original place. It is typically driven by specific needs, such as work or education, and can be categorized into regulated temporariness (like seasonal workers or temporary contracts), forced temporariness (such as refugees or those seeking protection), and flexible temporariness (movement within specific regions like the EU). While initially planned to be short-term, temporary migration can evolve based on personal circumstances, opportunities, and legal frameworks, sometimes leading to a longer stay or even permanent residence. It is a complex process influenced by both individual choices and external factors.

- ❑ Temporary migration for specific needs and circumstances



vii. Seasonal Migration

Karl Marx as an Exile



Did you know that? Karl Marx lived much of his life as an exile, forced to move from country to country because of his revolutionary ideas. Like many migrants, Marx sought a better future, but for him, it was a world where his political theories could flourish without oppression. His experience as an exile highlights how migration is often driven not just by the search for better economic conditions, but by the pursuit of freedom and the ability to express one's beliefs.

❑ Seasonal migration driven by environmental and work needs

Seasonal migration is when people or animals move between different places during certain times of the year, usually because of the seasons. For example, birds like the Arctic Tern or whales may travel long distances to find food or to breed in different places depending on the time of year. In humans, seasonal migration often happens when people move for work, like when certain groups of people, such as lower-caste or tribal communities in India, travel to find seasonal jobs, like harvesting crops. This type of migration happens because of environmental needs, such as finding food, breeding, or working, and can involve moving between different locations throughout the year. It shows how both animals and humans adapt to the changing seasons and their specific needs.

4.1.5 Theories of Migration

There are different ideas, or theories, about why people decide to move from one place to another. These theories help us understand the reasons behind migration, such as the search for better opportunities, escaping difficult situations, or responding to changes in the world around them.

4.1.5.1 Push and pull factors

Everett S. Lee created a theory to explain why people move from one place to another, which he called migration. He said that migration happens because of two main reasons: push factors and pull factors. Push factors are things that make people want to leave their home, like lack of jobs, political problems, natural disasters, war, or poverty. When life becomes difficult in their current place, people might decide to move somewhere else in search of a better life. Pull factors are the things that attract people to a new place, like better job opportunities, good healthcare, safety, or better living conditions (Lee, 1966; Massey et al., 1994). These positive factors make a new place seem better than the one they left behind. However, migration isn't always a simple decision. Lee explained that not everyone moves, even if they face push factors, because personal situations like age, family, or education can influence their choice. There are also obstacles, like high costs or language barriers, that make migration harder (Triandafyllidou, 2015; Bobek & Sandström, 2024). People are more likely to move when the reasons to go are stronger than the reasons to stay (Connor, Cohna, & Gonzalez Barrera, 2024).

❑ Migration influenced by pull factors and personal obstacles

❑ Migration is influenced by personal circumstances and challenges

Lee also pointed out that migration isn't always an easy choice. It can be a complex decision because people have different personal situations that affect their move. For example, a family might not want to leave their home because of their children's education, or an older person might find it harder to adapt to a new place. In addition, even if a person wants to move, there could be challenges like the cost of moving, language differences, or not knowing much about the new place. So, while push and pull factors influence migration, the decision to move depends on many different things that make it unique for each person or family.



4.1.5.2 Neoclassical economic theory

Neoclassical economic theory explains migration as a decision made by individuals who want to make more money. According to this theory, people are rational and will weigh the costs and benefits of moving to a new place. They choose to migrate when they see that they can earn more money or find better job opportunities in a different location. The decision depends on comparing wages, employment opportunities, and the costs of moving, both financially and emotionally.

Gypsies-Nomadic Migrants with a Rich History

Gypsies, also known as the Romani people, is that they have a long history of migration, moving across Europe and other parts of the world for centuries. Often traveling to escape persecution or in search of better opportunities, the Romani people are one of the most well-known nomadic communities. Their story is a powerful example of how migration is not always a choice but a way of life shaped by survival, resilience, and the quest for freedom.

❑ Migration for better wages

The theory suggests that workers usually move from low-income areas to high-income areas in search of higher wages and better jobs. Migration continues until the wage differences between regions become smaller or equal. This means that people migrate to places that promise better economic outcomes, and their skills and education play an important role in their decision-making. The theory sees migration as a way for individuals to improve their financial situation by moving to regions with better opportunities (Massey et al., 1994; Castles, De Haas, & Miller, 2014).

❑ Migration involves more than money

However, critics say that the neoclassical theory doesn't fully explain why people migrate. It focuses mostly on money and jobs, ignoring other important factors like family, culture, and politics. Migration isn't just about making money; it also involves family needs and the safety of loved ones. Later theories, like the new economics of migration, expanded on this idea by saying that migration decisions are also about securing the well-being of the whole family and managing risks, not just seeking individual income.

4.1.5.3 World-systems theory

❑ Migration driven by economic opportunities

World-systems theory looks at migration as a part of the global economy, which is made up of different types of countries: Core, Semi-Periphery, and Periphery. Core countries are rich and powerful, while Periphery countries are poorer and weaker. People from poorer countries (Periphery and Semi-Periphery) often move to wealthier Core countries in search of better job opportunities. Migration is mainly driven by the need to improve economic conditions, as people look for work that offers higher wages and better living standards (Wallerstein, 1974; Castles, De Haas, & Miller, 2014; Massey et al., 1994).

❑ Migration for low-paying or skilled jobs

One reason people move is to take low-paying jobs in Core countries that the local population doesn't want to do. For example, some people from poorer countries might move to a rich country and work in jobs like cleaning or agriculture. Another reason is the demand for skilled workers. Core countries benefit from professionals, like doctors or engineers, coming from poorer countries, as they don't have to pay for their education but get highly skilled workers (Fisher, 2014; Triandafyllidou, 2015). This allows the migration of skilled people to also help the Core countries grow economically.

❑ Migration maintains global inequality

According to world-systems theory, migration helps keep the differences in wealth and power between countries. As the rich countries (Core) expand economically, they need more workers, pulling people from poorer countries. Migration is seen as voluntary but driven by economic reasons, where people hope to earn more money and improve their lives. This movement of people not only benefits rich countries but also helps maintain the global economic system, keeping the inequality between rich and poor countries in place (Wallerstein, 1974; Rimoldi & Di Belgiojoso, 2020; Bobek & Sandström, 2024).

4.1.5.4 Social network theory

Social network theory helps us understand how migration works by focusing on the connections people have with others. One important way social networks help is by sharing information. When someone is thinking about moving to a new place, they often learn about the area through family, friends, or others who have already moved there. These networks provide details about things like jobs, housing, and what life is like in the new place. This makes it easier for migrants to decide where to go and what to expect (Massey et al., 1993;



❑ Social networks ease migration

❑ Social networks sustain migration

❑ Zelinsky's five migration stages

Boyd, 1989). Another way social networks support migration is by offering help during the move. Networks act like a safety net, offering both emotional and material support. This support can lower the risks and costs of moving. For example, migrants might have a friend or family member who can help them find a place to live or offer advice on adjusting to a new environment (Faist, 2000; Ryan, 2011).

Social networks also play a role in keeping migration going even after people have moved. Once someone has settled in a new place, their connections with others often lead more people from their home country or area to move there too. Networks with interconnected contacts, meaning that the people in the network know and interact with each other, are especially strong and helpful for migrants. These networks help keep the process of migration going by connecting people over long distances, making it easier to move and adjust to new places (Massey et al., 1998; Levitt & Jaworsky, 2007).

4.1.5.5 Migration Transition Theory

Migration Transition Theory explains why and how people move from one place to another as countries grow and change. It was introduced by Wilbur Zelinsky (1971), who noticed that as countries develop, they go through stages where their people first leave to find better opportunities elsewhere, and later, others start coming into their country. At first, as life gets better and jobs increase, more people want to leave their home country to explore new possibilities. But over time, as the country becomes more developed and offers more opportunities, fewer people leave, and instead, more people from other countries move in. This change in how people move is linked to how countries grow and improve (Skeldon, 1997). Zelinsky's theory also talks about five stages of migration. In the first stage, when countries are still traditional, there is not much movement because people mostly stay in rural areas and live off the land. In the second stage, as countries start developing factories and cities, many people leave villages to work in urban areas. By the third stage, most movement happens between cities, and fewer people are moving from villages. In the fourth stage, people move between cities or to the suburbs, which are quieter areas outside big cities. In the fifth and most advanced stage, people mainly move within cities or between them, and the country's population stops growing or even starts shrinking (Zelinsky, 1971; Castles, de Haas, & Miller, 2014).

❑ Zelinsky's "circulation" and migration transition

Zelinsky also introduced an important idea called *circulation*. This is different from migration because it does not mean permanently moving to a new place. Instead, it is about temporary or short-term movements, like going to work every day, traveling for business, or even going on a vacation. For example, farmers might move temporarily to pick crops in another place, or people might travel for work meetings and then return home. In modern times, even the exchange of ideas online, like sending messages or sharing videos, is considered a type of circulation. By looking at these patterns, Migration Transition Theory helps us understand how and why people move and how it is connected to how countries grow and change (Zelinsky, 1971; Skeldon, 1997).

4.1.6 Globalization and Migration

❑ Globalization's impacts

Globalization is the process that connects people, countries, and businesses around the world, sharing ideas, goods, and even cultures. While this makes the world feel smaller and more connected, it also brings problems. For example, when companies move factories to places with cheaper labour, people in richer countries might lose their jobs. Many farmers in poor countries leave their villages because farming gets too expensive and move to big cities in search of work. But not everyone finds a good job—some end up doing hard, unfair work just to survive.

The Great Indian Diaspora

Did you know that the Indian Diaspora is one of the largest in the world? Over 30 million people of Indian origin live outside India, making it the second-largest diaspora after the Chinese. Indian communities are spread across more than 100 countries, with significant populations in the United States, the United Arab Emirates, Canada, the United Kingdom, and Australia. These migrants have not only contributed to their new countries in areas like business, education, and politics but also maintained strong cultural ties with India, creating a unique blend of local and Indian traditions.

When people migrate to other countries, they often face challenges. They may struggle to fit in because of language differences or because they look different from others. They might



❑ Migration challenges

also experience unfair treatment, like lower wages or fewer rights than local workers. Governments may make it easier for skilled workers to move, but harder for others. This creates a world where some people can move freely and succeed, while others feel left behind and face difficulties. Globalization brings both opportunities and challenges. It can help some people but hurt others, especially the poor and those who struggle to adapt.

❑ Migration's mental health effects

Migration often changes how people see themselves and their place in the world. When someone moves to a new country or culture, they might lose familiar traditions, values, and support systems. This can make them feel lonely, confused, or scared about being judged by others. As they try to fit in, they might also struggle to hold on to their cultural roots, leading to an "identity crisis." Finding a balance between keeping their own culture and blending into the new one is a tough journey for many migrants. Moving to a new place can affect mental health in many ways. Migrants might feel sad or worried due to missing loved ones, losing social support, or facing discrimination. These feelings can sometimes lead to depression or anxiety, especially for those who had to flee difficult situations, like refugees or children separated from their families. On the brighter side, some migrants may find better opportunities or make new friends, which can improve their mental health. This shows that migration can bring both challenges and positive changes.

❑ Migrants' cultural identity struggles

One big challenge for migrants is keeping their cultural identity. They might feel pressure to change their habits and beliefs to fit into the new culture, which can make it hard to stay true to their roots. Facing discrimination can also make them feel unwelcome or unsure about showing their traditions. Younger generations often grow up blending their parents' culture with the new one, creating a mix that can sometimes lead to disagreements within families. These struggles highlight the importance of respecting and celebrating cultural diversity.

4.1.8 The Role of Identity and Belonging in the Migrant Experience

Identify and belonging are central to the migrant experience, shaping mental health and social integration. Migration often involves a process of identity reconstruction, as individuals navigate multiple cultural influences and reconcile the loss of familiar norms with new social realities (Anthias, 2002). This

❑ Migrants' identity and belonging challenges

process is fraught with challenges such as isolation, alienation, and struggles to form a coherent sense of self. Belonging extends beyond physical residence, requiring active participation in social networks, cultural adaptation, and overcoming systemic exclusion (Ryan, 2011; Levitt & Glick Schiller, 2004). Generational differences also play a significant role, with children and adolescents experiencing unique challenges in forming their identities (Castles et al., 2014). Ultimately, migration is a journey toward finding a sense of authentic belonging, often amid complex cultural and social landscapes.

4.1.9 Migrants as Socially Excluded Groups

❑ Migrants' social exclusion

Migrants often experience profound social exclusion across economic, social, and psychological domains. Economically, they are frequently relegated to low-wage, informal jobs and excluded from mainstream labour markets, trapping them in cycles of marginalization. Politically, many migrants lack the rights and protections afforded to citizens, often described as "rootless non-citizens." Socially, they encounter barriers such as cultural "otherness," discriminatory policies, and institutional hurdles. These factors collectively lead to significant psychological challenges, including depression, alienation, and a sense of helplessness. The degree of exclusion varies based on factors like migration generation, ethnic background, and length of stay in the host country. This systemic exclusion not only undermines migrants' integration efforts but also fuels broader societal tensions and instability.

4.1.10 Migrant Labour and Experiences of Systemic Exclusion

❑ Systemic injustices for migrants

Migrant workers face widespread systemic exclusion, impacting their access to housing, education, healthcare, and job security. They are often treated unfairly, particularly in the workplace, where undocumented migrants are vulnerable to exploitation, harassment, and wage theft. Politically, their inability to vote or participate in decision-making processes leaves them without a voice. The COVID-19 pandemic exacerbated these challenges, as migrants were disproportionately subjected to unsafe working conditions, exclusion from relief programs, and scapegoating for virus transmission. These systemic injustices perpetuate cycles of marginalization, making it increasingly difficult for migrant workers to improve their living conditions or achieve social mobility.



Malala Yousafzai–A Migrant for Education and Equality



Malala Yousafzai in her fight for girls' education forced her to become a migrant. After surviving an attack by the Taliban in her home country of Pakistan, Malala moved to the UK for safety and to continue her education. Like many migrants, Malala sought a better future, not just for herself, but for girls around the world. Her journey highlights how migration can be driven by the need for safety, education, and the right to live without fear, while also being a powerful symbol of courage and change.

4.1.11 Refugees and Asylum Seekers

Refugees and asylum seekers live under constant uncertainty, facing precarious legal and social conditions. The process of obtaining refugee status is often lengthy and stressful, leaving individuals in prolonged states of anxiety. Even those granted temporary protection face ongoing fears of reassessment. Many are confined to unstable, low-paying jobs due to legal restrictions, such as limited work permits and travel bans. This legal limbo profoundly affects their mental health, leading to feelings of hopelessness, emotional withdrawal, and in severe cases, suicidal thoughts. While basic rights like housing, food, healthcare, and education are theoretically guaranteed, the pervasive uncertainties of their situation perpetuate their vulnerability and distress.

❑ Refugees' uncertainty and distress

4.1.12 Exclusionary Practices in Host Societies

Migrants and minorities often face exclusion in host societies through practices rooted in nationality, ethnicity, and legal status (Castles, De Haas, & Miller, 2014). Immigration and citizenship policies create hierarchies that marginalize specific groups based on race, religion, and class (Triandafyllidou, 2015). Social identities further compound this exclusion, as cultural "othering" and institutional biases reinforce discrimination in workplaces, public institutions, and societal attitudes. Mechanisms such as border securitization, biometric tracking, and detention centers amplify these inequities, stigmatizing migrants and restricting their opportunities for integration (Rimoldi & Di Belgiojoso, 2020). This systemic exclusion results in social stigmatization, limited access to resources, and strained community relations, with vulnerable populations like refugees and undocumented migrants bearing the brunt of these challenges (Bobek & Sandström, 2024).

❑ Exclusion of migrants and minorities

4.1.12.1 Rohingya Refugees in Bangladesh

The Rohingya are a Muslim minority group from Myanmar who have faced terrible violence and discrimination for many years. One major problem is Myanmar's 1982 Citizenship Law, which denies them citizenship. This means they don't officially belong to any country, making it hard for them to get basic rights like healthcare, education, or jobs. Because of this, many Rohingya had to flee their homes. The biggest wave of migration happened in 2017 when military attacks forced over 960,000 Rohingya to escape to neighboring Bangladesh. Most of them now live in the Cox's Bazar region, which has become home to the largest refugee camps in the world.

❑ Rohingya persecution and migration

Life in these camps is very difficult. The camps are overcrowded, and the refugees rely on humanitarian aid to survive. Resources like food, water, and healthcare are often not enough for everyone. On top of that, they face hostility from some local people in Bangladesh, as refugees are frequently perceived as a burden in host societies (Bobek & Sandström, 2024). Many locals blame them for problems like increased crime and environmental damage. This negative attitude has led to calls for their deportation and even acts of violence against them (Rimoldi & Di Belgiojoso, 2020).

❑ Challenges in refugee camps

The Rohingya's struggle is a powerful example of how ethnic and religious identities can lead to exclusion. Without cit-



❑ Rohingya exclusion and statelessness

izenship, they remain stateless, unable to enjoy the rights most people take for granted. Their situation shows how discrimination and violence can force people to leave their homes, only to face new challenges in places where they seek safety.

4.1.12.2 Syrian Refugees and the European Migration Crisis

❑ Syrian refugee crisis in Europe

The Syrian refugee crisis began in 2011 when a civil war forced millions of people to flee their homes in search of safety. Many of them sought refuge in Europe, with over a million arriving by 2015, mostly through countries like Greece and Turkey. While some countries like Germany and Sweden welcomed the refugees, others, such as Hungary and Poland, made it difficult for them to enter. This caused disagreements and put pressure on Europe's resources, as many countries introduced strict rules to limit the number of refugees, and some even made deals with Turkey to slow down migration (Castles, De Haas, & Miller, 2014; Triandafyllidou, 2015).

❑ Economic struggles and discrimination faced by Syrian refugees

In the countries that welcomed refugees, such as Lebanon, Jordan, and Turkey, the refugees helped by spending money and using services, but they also faced many challenges. They often couldn't find good jobs and lived in poverty, relying on aid to survive. Housing became expensive because of the increased demand, and locals sometimes blamed refugees for these economic struggles. Refugees also faced unfair treatment, like not being able to get legal status, work, or access important services. This discrimination, called xenophobia, made them feel isolated and unwelcome, creating a cycle of exclusion that made their situation even harder (Rimoldi & Di Belgiojoso, 2020; Bobek & Sandström, 2024).

❑ Mental health struggles and need for support for Syrian refugees

These challenges have greatly affected the mental health of many refugees, causing stress, depression, and trauma from the war and discrimination. Many refugees don't get the support they need and have to face these problems alone. Although refugees have a lot of potential to contribute to their new communities, they need better help to overcome these challenges and create better lives for themselves.

4.1.12.3 Mexican Migrants in the United States

Mexican migrants are the largest immigrant group in the United States, with about 12 million people, including 4.1 million undocumented. Their numbers have gone up and down

❑ Mexican migrants in the U.S.

over the years, peaking at 12.8 million in 2007 but decreasing since then due to stricter immigration policies and changing economic conditions (Connor, Cohna, & Gonzalez Barrera, 2024; Castles, De Haas, & Miller, 2014). Many Mexican immigrants live in states like California and Texas, where they often take on low-wage jobs. Despite earning less than other immigrant groups, their contributions are significant, as they send billions of dollars in remittances—around \$66.5 billion in 2024—back to Mexico, helping its economy (Connor et al., 2024).

❑ Reasons for Mexican migration to the U.S.

Mexican migrants stay in the United States for several important reasons. First, they seek better job opportunities and higher wages compared to what they can find in Mexico. Many are drawn to the U.S. by the chance to improve their financial situation and support their families (Castles et al., 2014; Triandafyllidou, 2015). Second, social ties play a big role. Many migrants have family and friends in the U.S., which makes it easier to settle and feel supported (Rimoldi & Di Belgiojoso, 2020). Finally, safety is another major factor. Mexico's high crime rates, often linked to drug cartels, push people to move to the U.S. in search of a more secure life (Bobek & Sandström, 2024).

Kerala's People Around the World!

People from Kerala have been moving to different countries for a long time to find better work and opportunities. Since the 1960s, many Keralites went to the Gulf countries like Saudi Arabia and the UAE for jobs in the oil industry. Today, you can find Keralites all over the world, from the Middle East to America and Europe! The money they send back to Kerala has helped the state grow and improve, showing how migration has connected Kerala to the rest of the world.

❑ Challenges for Mexican migrants in the U.S

However, life in the U.S. isn't always easy for Mexican migrants. Strict immigration policies, such as those enforced by U.S. Immigration and Customs Enforcement (ICE), lead to frequent deportations, especially for undocumented migrants. Many migrants also face tough working conditions, taking on low-paying jobs where they may be exploited by employers and lack legal protections (Triandafyllidou, 2015; Rimoldi & Di Belgiojoso, 2020). Cultural stigmatization and racial profiling make it harder for them to feel included in society. These challenges create barriers that prevent Mexican migrants from



fully participating in their communities, even as they work hard to build better lives (Castles et al., 2014; Bobek & Sandström, 2024).

4.1.12.5 South African Xenophobic Attacks (2008, 2015, 2019)

South Africa has faced serious attacks on migrants, especially in 2008, 2015, and 2019. In 2008, the violence started in Alexandra, Johannesburg, and quickly spread. More than 60 people died, and many migrants from neighboring countries like Zimbabwe and Mozambique had to leave their homes (Castles, De Haas, & Miller, 2014; Triandafyllidou, 2015). Locals blamed these migrants for taking away jobs and resources, which caused anger and violence (Rimoldi & Di Belgiojoso, 2020). In 2015, the violence happened again, especially in Durban and Johannesburg. Mobs attacked migrants, killing at least seven people and destroying their homes and businesses. The army had to step in to help. By 2019, the violence was back, almost as bad as in 2015, and the government was criticized for not doing enough to stop it or protect the victims (Bobek & Sandström, 2024; Connor, Cohna, & Gonzalez Barrera, 2024).

❑ Anti-migrant violence in South Africa

These attacks were driven by unfair blame. Migrants were often blamed for unemployment and economic problems, leading to violence, isolation, and discrimination. They couldn't get housing or services and felt like the government wasn't protecting them. Instead of solving the real problems like poverty and inequality, people used xenophobia to shift the blame onto migrants, making things worse. It shows how fear and economic problems can lead to unfair treatment of outsiders, and how it's important to work together for a fair society.

❑ Xenophobia and scapegoating of migrants

4.1.12.6 Palestinian Refugees in Lebanon

Palestinian refugees in Lebanon mainly arrived after the 1948 Nakba, when many Palestinians were forced to leave their homes due to the Israel-Palestine conflict. Today, there are between 250,000 to 400,000 refugees living in Lebanon, many of them living in 12 official refugee camps. These refugees face serious exclusionary practices. They are denied citizenship and cannot work in many professions like law or medicine, and they also can't own property. Because of this, many refugees are stateless, meaning they don't belong to any country, and they depend on international aid to survive (Castles, De Haas, & Miller, 2014; Triandafyllidou, 2015).

❑ Palestinian refugees' exclusion in Lebanon

❑ Poor living conditions for Palestinian refugees

Living conditions for Palestinian refugees in Lebanon are very difficult. The camps are overcrowded, with families often living in small spaces, sometimes sharing rooms with up to ten people. The infrastructure in the camps is poor, with problems like bad sanitation, unreliable electricity, and not enough clean water. Building and repairing homes is also difficult because the government restricts the materials that can be used. Many refugees cannot find stable jobs because of the legal barriers, and unemployment is very high, leading many to work in low-paying, informal jobs that don't offer any benefits or protections (Rimoldi & Di Belgiojoso, 2020).

❑ Poverty and violence faced by Palestinian refugees

The refugees face many challenges every day. Poverty is a big issue, with 93% of refugees living in extreme poverty. Many can't afford basic things like food, healthcare, and medicines, and rising costs make things even worse. There is also violence inside the camps, which creates an unsafe environment for families. Because of all these struggles, Palestinian refugees in Lebanon continue to face a life of exclusion and dependence on help from outside. This shows how long-term displacement can result in generational exclusion and poverty, making it very hard for refugees to build a better future.

4.1.12.7. Challenges Faced by Migrant Workers During COVID-19

❑ Challenges faced by returning migrant workers

During the COVID-19 pandemic, internal migrant workers in India faced many struggles, especially when they tried to return to their hometowns. Over 43 million workers, who had moved to cities for jobs, suddenly lost their livelihoods because of the lockdown. With no jobs or savings, they were left without money or food. Since public transport was stopped, many workers had to walk long distances, sometimes hundreds of kilometers, to get home. This journey was dangerous, and many faced hunger, accidents, or even violence along the way (Bobek & Sandström, 2024; Rimoldi & Di Belgiojoso, 2020). Once they returned home, migrant workers faced even more challenges. They often had no access to healthcare and struggled to find food. They were also stigmatized—some people in their villages thought they might bring the virus with them and avoided them. This discrimination made things even harder for the workers. Moreover, the government's help was often not enough or poorly managed, leaving many migrants without the support they needed during such a difficult time (Bobek & Sandström, 2024; Castles, De Haas, & Miller, 2014).



The Gold Rush That Changed Australia

The Australian gold rush in the 1850s turned Australia into a melting pot of people from all over the world! Thousands of hopeful gold hunters from places like China, England, and America rushed to Australia, making the population grow so fast that it nearly doubled in just 10 years! These gold-seekers didn't just find gold—they helped create a mix of cultures that shaped Australia into the country it is today.

❑ Pandemic highlights migrant workers' vulnerability and inequality

The situation during the pandemic highlighted how migrant workers in India are often treated unfairly. They don't have the same access to healthcare, food, or social security as others. The sudden lockdowns, which led to job loss and the inability to get transport, left migrants stranded and in need of help. These problems are not just about the pandemic—they show a bigger issue of class and regional inequalities that affect migrant workers even in normal times. This situation shows how vulnerable they are and the need for better protection and support in the future.

4.1.13 The intersection of migration and social exclusion

❑ Migration leads to social exclusion and unequal treatment

Migration and social exclusion are closely linked, with migrants often facing challenges that make them feel left out or treated unfairly. Social exclusion can happen in several ways, including structural barriers like discrimination in jobs and institutions. Migrants may also struggle to access important services like healthcare, education, or legal rights. Often, they are treated unfairly compared to native people, making it harder for them to fully participate in society.

❑ Migrants face identity challenges and multidimensional exclusion

Another major issue is the identity challenges that migrants face. Many find it difficult to feel like they belong in new cities or countries. There can be conflicts between migrants and local residents, and migrants may feel like "rootless non-citizens" without a sense of belonging. This can lead to multidimensional exclusion, where migrants face economic hardship and have limited access to social and political rights. The social inequalities they experience make it harder for them to have the same opportunities as others in society.

Social exclusion is even more intense for certain groups of migrants, like women, older individuals, or those with low income. These migrants face intersectional challenges, meaning they are affected by multiple types of discrimination at once. To address these issues, it's important for governments and societies to find ways to include migrants, recognize their contributions, and break down the barriers that prevent them from fully participating in society.

Summarised Overview

Migration is a universal phenomenon driven by aspirations for better opportunities, safety, and social transformation. However, it often results in social exclusion, where migrants face discrimination, marginalization, and identity crises. Historical migrations, such as the Neolithic Revolution and colonial expansions, laid the foundation for modern patterns influenced by globalization and economic disparity. Theories like push-pull factors and world-systems theory provide insights into the motivations behind migration. Migrants encounter systemic barriers in labor markets, legal systems, and social integration, as seen in case studies from Bangladesh, Europe, and India. Addressing these challenges requires understanding the interconnectedness of migration, social exclusion, and identity.

Self-Assessment Questions

1. What are the primary reasons people migrate according to the push-pull factors theory?
2. How did the Neolithic Revolution influence early migration patterns?
3. Differentiate between voluntary and involuntary migration with examples.
4. Explain the significance of social networks in facilitating migration.
5. What are some economic impacts of globalization on migration?
6. Describe the challenges faced by refugees in host societies using specific examples.
7. How does migration contribute to identity crises among individuals?
8. What role does the world-systems theory play in understanding migration patterns?
9. In what ways do migrants experience systemic exclusion in labour markets?



Assignments

1. Analyze the impact of globalization on migration trends with real-world examples.
2. Compare and contrast internal and international migration in terms of causes and effects.
3. Discuss the multidimensional nature of social exclusion faced by migrants.
4. Evaluate the role of legal frameworks in perpetuating exclusionary practices against migrants.
5. Critically assess the contribution of migrants to the economies of host countries.
6. Explore the role of historical migration patterns in shaping modern demographic trends.
7. Analyze the Rohingya refugee crisis in the context of systemic exclusion.

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Suggested Reading

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU

UNIT 2

LGBTQ+

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ understand LGBTQ+ as sexual minorities and their marginalization
- ▶ analyze the impact of discrimination and marginalization on sexual minorities
- ▶ evaluate strategies and policies aimed at promoting inclusivity, rights, and empowerment
- ▶ develop a critical perspective on the intersection of LGBTQ+ issues

Background

Envisage a world where every person is handed a box at birth labeled “Male” or “Female,” each filled with instructions dictating how to dress, behave, love, and live. For centuries, societies have upheld these rigid frameworks, erasing experiences that do not fit neatly into this binary. The LGBTQ+ community, encompassing Lesbian, Gay, Bisexual, Transgender, Queer, and other identities, challenges these norms by asserting the validity of diverse sexualities and genders. Yet, this resistance often comes at a cost, as deeply entrenched cultural, religious, and legal systems stigmatize non-heteronormative identities, labeling them “immoral” or “unnatural.” This results in widespread exclusion, manifesting in discriminatory laws, workplace harassment, bullying, and even violence, leaving many LGBTQ+ individuals isolated and vulnerable.

Despite these challenges, these movements have emerged as a beacon of resistance and resilience. Activism, from the Stonewall riots to global Pride parades, has pushed for visibility, equality, and dignity. While progress has been made in certain parts of the world, the exclusion persists, rooted in the historical and socio-cultural mechanisms that prioritize conformity over diversity. Understanding the experiences of LGBTQ+ individuals and addressing systemic discrimination is essential for fostering a society where everyone can thrive, regardless of their identity.



Keywords

Identity, Inclusivity, Rights, Discrimination, Advocacy, Marginalization

Discussion

Sexual minorities, particularly in India, face significant challenges rooted in colonial-era laws and societal prejudices that foster discrimination and exclusion. Despite legal progress like the decriminalization of same-sex relationships and transgender rights, many still encounter social and economic obstacles, such as family rejection, limited healthcare access, and workplace discrimination. The intersection of caste and class deepens the marginalization of certain groups within the community. While activism has advanced their rights, issues such as marriage equality, adoption rights, and anti-discrimination protections remain unresolved. Achieving justice requires an inclusive approach to queer politics that addresses the complex intersections of caste, class, and rural-urban divides.

4.2.1 LGBTQ+

The term LGBTQ+ represents a group of people with different sexual orientations and gender identities. It stands for lesbian (women who love other women), gay (people who love others of the same gender), bisexual (those who love more than one gender), transgender (people whose gender is different from the one they were born with), queer (those who don't fit traditional labels), and questioning (people still figuring out their identity). The "+" includes others who don't fit into these categories. This term has grown over time to include more people and shows a community that is proud, diverse, and fights against unfair treatment. Some people have misconceptions about the community of sexual and gender minorities. They may believe being gay or bisexual is a choice, but it's simply who someone is. Others think it's only about relationships, but it also involves love, emotions, and self-expression. Many assume nonbinary individuals must look a certain way, but being nonbinary means not fitting into traditional "male" or "female" categories. Some mistakenly think these identities are new, when they've existed for centuries. Unfortunately, some still view them as a problem, despite experts affirming they are a

❑ Misconceptions about sexual and gender minorities

natural part of human diversity. These misunderstandings often lead to unfair treatment, highlighting the importance of shifting societal attitudes.

LGBTQ+ individuals are often considered sexual minorities because their sexual orientations or gender identities differ from the majority of the population. This minority status can lead to unique challenges, including discrimination and social exclusion, but also fosters a strong sense of community and resilience.

Breaking Stereotypes—Sweden's Gender-Free Preschools

In Sweden, some preschools are pioneering gender-free education, aiming to break stereotypes from the start. They avoid gendered pronouns, blend traditionally "male" and "female" activities, and encourage children to explore all roles freely. This innovative approach is shaping a more inclusive and open-minded generation.

4.2.2 Sexual Minorities in India

❑ Sexual minorities in India and historical shifts

Sexual minorities in India include individuals whose sexual orientation, gender identity, or gender expression differ from the heterosexual and cisgender majority (Rodrigues, Leite, & Queirós, 2017). Historically, India was more accepting of diverse sexualities and gender identities, with ancient texts like the Kamasutra and temple carvings at Khajuraho celebrating love and relationships in many forms (Chatterjee, 2018). Hindu mythology also featured stories, like that of Ardhanarishvara, a deity embodying both male and female aspects, reflecting a culture that embraced gender fluidity (Rege, 2003; Halberstam, 2005). However, British colonial rule introduced Section 377 in 1861, criminalizing certain forms of love, which led to the marginalization of these communities (Haralambos, 2002; Chatterjee, 2018).

In recent years, India has seen some significant legal changes aimed at protecting sexual minorities. In 2018, the Supreme Court decriminalized consensual same-sex relationships in the landmark Navtej Singh Johar case, providing a major boost to their rights (Chatterjee, 2018; Haralambos, 2002). Additionally, the 2014 NALSA v. Union of India case recognized transgender



❑ Legal advancements and challenges for sexual minorities in India

❑ Role of activism and intersectionality in advocating for sexual minorities

❑ Challenges faced by sexual minorities in India

people as a third gender, allowing them to identify as they choose (Rege, 2003; Halberstam, 2005). Despite these advancements, challenges remain, such as the inability to marry, adopt children, and the lack of comprehensive anti-discrimination laws (Chatterjee, 2018; Rodrigues, Leite, & Queirós, 2017). In 2019, the Transgender Persons (Protection of Rights) Act was introduced to safeguard the rights of transgender individuals but has faced criticism for not fully addressing their needs, especially regarding documentation and public access issues (Halberstam, 2005; Rege, 2003).

Activism has played a crucial role in advocating for the rights of sexual minorities in India. Pride marches and media representation have helped raise awareness and foster acceptance (Chatterjee, 2018; Haralambos, 2002). Organizations like the Humsafar Trust and Naz Foundation have been pivotal in fighting for equality, ensuring the safety and dignity of individuals in the queer community (Halberstam, 2005; Rodrigues, Leite, & Queirós, 2017). However, these groups continue to face compounded challenges due to their caste, class, and religion. For instance, Dalit or Muslim queer individuals often experience discrimination not only for their sexual orientation or gender identity but also due to their marginalized social status (Rege, 2003; Chatterjee, 2018). This intersectionality of identity underscores the heightened barriers faced by certain individuals, particularly in rural or economically disadvantaged areas, highlighting the need for a more inclusive approach to their rights (Halberstam, 2005; Rodrigues, Leite, & Queirós, 2017).

4.2.3 Issues of Sexual Minorities in India

Sexual minorities in India face many challenges, including violence and discrimination, especially against the LGBTQ+ community (Chatterjee, 2018; Haralambos, 2002). Many people in this group experience rejection from their families, which can lead to forced marriages and mental health struggles like depression and anxiety due to the negative stigma in society (Halberstam, 2005; Rodrigues, Leite, & Queirós, 2017). Even though there have been some legal changes, such as the decriminalization of homosexuality in 2018, these individuals still struggle with a lack of political representation and limited access to healthcare and job opportunities (Rege, 2003; Chatterjee, 2018). The Hijra community, recognized as a third gender, also faces major difficulties in securing basic rights and safety, showing that there are still significant inequalities (Halberstam, 2005; Haralambos, 2002).

Breaking Stereotypes–Sweden's Gender-Free Preschools



Did You Know? K. Prithika Yashini made history as India's first transgender sub-inspector in Tamil Nadu, breaking barriers in law enforcement. Despite being rejected by the recruitment board, she fought her case in the Madras High Court, which ruled in her favour, paving the way for transgender representation in the police force. Appointed in 2017, Yashini's journey from facing societal rejection to receiving her appointment order stands as an inspiring story of courage and perseverance.

❑ Importance of social acceptance and family support for sexual minorities

❑ Impact of internalized stigma on sexual minorities

Social acceptance and family support are really important for the well-being of sexual minorities. When families accept their loved ones, it helps them feel good about themselves and stay healthy, both mentally and physically. On the other hand, when they face rejection from their families or society, it can cause a lot of emotional pain and make them feel isolated. Having supportive communities where individuals can share their experiences without fear of judgment also helps them become stronger and more resilient. This support is key in reducing the negative effects of discrimination and stress on sexual minorities.

Internalized stigma, which means feeling ashamed because of society's negative views, is another big issue. Many sexual minorities feel bad about themselves and experience low self-esteem, which can lead to mental health problems like depression and anxiety. For some, this internalized shame can make them feel hopeless and even lead to suicidal thoughts. It can also cause people to engage in risky behaviours, such as substance abuse or unsafe sexual practices, which further harm their health. This constant stress worsens the challenges faced by sexual minorities.

❑ Healthcare challenges faced by sexual minorities in India

Sexual minorities in India also face huge problems when it comes to healthcare. Many of them are excluded from medical services, which leads to poor health outcomes. They often face discrimination from healthcare providers, who may refuse to treat them or misunderstand their health needs. Many healthcare workers do not have proper training on LGBTQ+ health, which makes it harder for these individuals to get the care they need. Financial problems also prevent many in the community from affording healthcare, making it even more difficult for them to stay healthy.

❑ Barriers to welfare and economic challenges for sexual minorities

Sexual minorities often find it hard to access government welfare programs. Although there are laws in place, like the Transgender Persons (Protection of Rights) Act, 2019, these laws do not always provide the necessary services or protections (Rege, 2003; Halberstam, 2005). Only a few states, like Tamil Nadu, have special programs for transgender people (Chatterjee, 2018; Rodrigues, Leite, & Queirós, 2017). Many individuals from these communities are also excluded from basic services like pensions or housing due to discrimination (Haralambos, 2002; Chatterjee, 2018). Lack of job opportunities is a major issue, as many transgender people face harassment at work or are forced into begging or sex work. This affects their ability to support themselves and contributes to India's economic losses (Halberstam, 2005; Rege, 2003).

❑ Queer politics in India and its intersectional struggles

4.2.4 Queer Politics in India

Queer politics in India reflects the country's rich and complex social conditions, grappling with legal challenges, intersectional struggles, and the quest for social emancipation. Over the decades, the movement has grown into a dynamic force advocating for rights, recognition, and inclusion, while addressing systemic inequalities rooted in caste, class, gender, and religion.

❑ Queer movement and Section 377

The queer movement in India began to gain momentum in the late 1980s and early 1990s, with early activism focusing on repealing Section 377 of the Indian Penal Code, which criminalized same-sex relations under the guise of "unnatural offenses" (Chatterjee, 2018; Haralambos, 2002). A significant milestone was achieved in 2009 when the Delhi High Court decriminalized consensual homosexual acts (Chatterjee, 2018; Rodrigues, Leite, & Queirós, 2017). However, this was short-lived, as the Supreme Court reinstated Section 377 in 2013 (Halberstam, 2005; Rege, 2003). Finally, in 2018, the Supreme Court struck down the colonial-era law, marking a historic

victory for LGBTQIA+ rights (Chatterjee, 2018; Haralambos, 2002).

Despite this legal triumph, the movement continues to face hurdles. Broader legal recognition remains limited, with issues such as marriage equality, adoption rights, and protections against discrimination still unresolved. These challenges highlight the disparity between legal progress and societal acceptance.

Nepal's Passport Gets an Upgrade-Third Gender Edition!

In 2007, Nepal made history by becoming one of the first countries to officially recognize a third gender on passports and national IDs. This groundbreaking decision highlighted Nepal's progressive approach to acknowledging gender diversity and paved the way for greater recognition and rights for non-binary individuals.

4.2.5 Intersectionality and Social Inequalities

❑ Intersectionality and caste issues in queer politics

Queer politics in India is deeply intersectional, addressing the overlapping impacts of caste, class, and gender on queer lives. Dalit queer and trans activists have pointed out the dominance of upper-caste voices in the LGBTQIA+ movement, often sidelining the unique struggles of marginalized communities. For Dalit individuals, systemic caste discrimination compounds the difficulties of navigating queerphobia, resulting in limited social mobility, inadequate representation, and heightened violence.

Similarly, rural queer individuals face distinct challenges compared to their urban counterparts. Urban areas offer better visibility, support networks, and organized activism, while rural regions often reinforce traditional gender norms and queerphobia (Chatterjee, 2018; Halberstam, 2005). This disparity underscores the need for a more inclusive approach to queer mobilization that considers the unique realities of rural and marginalized communities (Rege, 2003; Rodrigues, Leite, & Queirós, 2017). Sexual minorities in India have made significant strides in gaining recognition and rights, yet the journey toward



- ❑ Urban-rural disparities in queer challenges

true equality remains incomplete. Legal victories, though crucial, are insufficient without societal acceptance and structural reforms. The intersectionality of caste, class, and rural-urban divides further complicates the fight for justice, demanding a more inclusive approach to queer politics. By addressing these challenges holistically and fostering acceptance within families and communities, India can create a society that truly upholds the dignity and rights of all individuals, irrespective of their sexual orientation or gender identity.

Summarised Overview

This chapter explored the challenges and progress for sexual minorities in India, addressing legal, social, and intersectional dimensions. It clarified the meaning of LGBTQ+ and dispelled common misconceptions, while tracing India's historical acceptance of sexual diversity, disrupted by colonial-era laws like Section 377. Key legal milestones, including the Navtej Singh Johar judgment and the Transgender Persons Act, were examined, highlighting both their significance and limitations. The role of activism in advancing rights was emphasized, alongside the compounded struggles of Dalit and rural queer individuals due to caste, class, and rural-urban divides. The chapter also underscored the importance of family support and societal acceptance in enhancing the well-being of sexual minorities, while addressing persistent stigma and discrimination in healthcare, education, and employment. Ultimately, it called for inclusive politics and cultural change to ensure lasting progress in both laws and societal attitudes, fostering a more equitable and accepting society.

Self-Assessment Questions

1. What does the term LGBTQ+ encompass?
2. How did British colonial laws impact the rights of sexual minorities in India?
3. What was the significance of the Navtej Singh Johar case?
4. How does caste intersectionality affect queer individuals in India?
5. What are some misconceptions about sexual and gender minorities?
6. Why is family acceptance crucial for the well-being of LGBTQ+ individuals?
7. What are the major challenges faced by rural queer communities in India?
8. How does internalized stigma impact the mental health of sexual minorities?
9. What are some limitations of the Transgender Persons (Protection of Rights) Act, 2019?
10. How has activism contributed to the advancement of queer rights in India?

Assignments

1. Discuss the historical portrayal of sexual and gender diversity in ancient Indian texts and mythology.
2. Analyze the legal journey of LGBTQ+ rights in India, focusing on key landmark cases.
3. Critically evaluate the impact of societal attitudes on the mental health of sexual minorities in India.
4. Explore the role of activism and media representation in raising awareness about LGBTQ+ issues.
5. Discuss the intersection of caste, class, and gender within the LGBTQ+ movement in India.
6. Assess the shortcomings of welfare programs for sexual minorities in India.
7. Propose inclusive strategies for queer politics that address intersectional challenges in India

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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

SGOU



UNIT 3

Digital Divide

Learning Outcomes

Upon completion of this unit, the learner will be able to:

- ▶ understand the digital divide, its dimensions, and its impact on education, jobs, and daily life
- ▶ analyze the factors driving digital inequities, including infrastructure, demographics, and literacy gaps
- ▶ explore strategies and policies to promote digital inclusion for marginalized groups
- ▶ evaluate global and regional digital trends and propose solutions for a more connected society

Background

In today's world, technology is like the key to a vast, interconnected world of information, opportunities, and experiences. Just as a door opens to a new room, access to the internet and digital devices opens doors to education, jobs, healthcare, and social interactions. But not everyone has that key. The digital divide refers to the gap between those who have access to these digital tools and those who are left on the outside, unable to participate fully in the digital world. This divide has become a major force behind social exclusion, where entire communities or groups find themselves locked out of opportunities that others take for granted.

Consider the example of two students: Ayesha, who lives in a fast-paced city, has a laptop, high-speed internet, and digital skills. She easily attends online classes, submits assignments, and connects with friends and mentors. On the other hand, Raj, living in a remote village, has a smartphone but struggles with slow internet and limited knowledge about using online platforms. While Ayesha advances through the digital world, Raj's learning experience is constantly interrupted by connectivity issues, and his access to opportunities remains severely limited. In this way, Ayesha and Raj live in two parallel worlds—one where digital tools create endless opportunities, and the other where they serve as barriers, deepening inequalities.

The digital divide is not just about having or not having technology. Imagine trying to navigate a library with hundreds of books but not knowing how to read. The inability to use technology effectively is another critical layer of the divide. Digital literacy, or the skills needed to navigate the online world, is like the ability to read those books. Without these skills, the most advanced technology becomes useless, trapping people in a cycle of exclusion. A person who doesn't know how to use a computer or the internet may miss out on job applications, educational resources, or even the chance to access essential health information.

Keywords

Digital inequality, connectivity gap, access disparity, technology divide, digital inclusion.

Discussion

The digital divide is the gap between people who have access to modern technology, like the internet and smartphones, and those who don't. Imagine a classroom where some students have laptops and fast internet for their homework, while others share outdated computers or don't have any devices at all. This difference means not everyone has the same opportunities to learn, work, or stay connected. Marshall McLuhan, a famous media theorist, once said, "*The medium is the message*," meaning that the tools we use to communicate—like phones, TV, or the internet—shape how we think and live. For example, reading news on your phone feels very different from hearing it on the radio. The way we access information changes how we experience the world.

But what happens when some people can't afford these tools or don't know how to use them? In many places, the internet is either too expensive or unavailable, creating a gap that can make life harder for those without access. As technology becomes essential for school, jobs, and everyday life, this gap grows wider, leaving many people behind. Understanding the digital divide helps us see why it's important to make technology accessible to everyone. By bridging this gap, we can ensure equal opportunities for all, no matter where they live or what they can afford.



4.3.1 Digital Divide

The digital divide is the gap between people who have access to digital technologies and those who don't. This means that while some people can use smartphones, computers, or the internet to learn, work, or connect with others, many cannot. This difference happens because of where they live, their income, or their level of education. For example, a student with a fast internet connection and a laptop can easily study online, but another student without these resources may struggle to keep up. This divide is not just about owning a device; it also includes internet access and how well people understand and use technology. Some areas, especially in rural or less developed regions, may not have reliable internet services. Many people lack the skills to use digital tools effectively. This creates an even bigger gap between those who can fully participate in the digital world and those who cannot.

❑ Digital divide issues

The quality of technology also matters. Some people might have outdated devices or slow internet connections, making it hard to use advanced tools or access online opportunities. These differences can lead to inequalities in education, jobs, and even healthcare, as more services moved online. Solving the digital divide means ensuring everyone, regardless of where they live or their background, has the same chance to use and benefit from technology.

❑ Technology access inequality

4.3.2 Historical background of Digital Divide

The concept of the digital divide dates back long before the late 20th century, initially referring to disparities in telephone access. Over time, it evolved, and by the late 1990s, it became more focused on the differences between those with and without internet access, especially broadband connectivity (Van Dijk, 2020; Lupač, 2018). The term gained traction in 1996 when Allen Hammond and Larry Irving used it to highlight the divide between those who had access to computers and the internet and those who did not (Servon, 2002).

Historically, the digital divide is rooted in broader discussions about access to information and technological inequality. Philosophers like Jean Jacques Rousseau advocated for the equitable distribution of resources and benefits, influencing later arguments for universal access to services. This foundational idea evolved into discussions about providing equal opportunities in accessing new technologies as they emerged (Castells, 2001; Servon, 2002).

❑ Challenges faced by sexual minorities in India

The Power of Free and Open-Source Software

Did you know that the Free Software Foundation (FSF) and open-source software have revolutionized the way we use technology? Created by Richard Stallman in 1985, the FSF advocates for software that gives users the freedom to use, study, and share it. This idea inspired the open-source movement, which focuses on the practical benefits of software being free for anyone to modify and improve. Together, they've shaped the tech world, making software more accessible, secure, and innovative, all thanks to the idea that sharing is powerful!

❑ Broader digital inequalities

The digital divide shows that inequalities exist in several areas, including access to technology, internet connectivity, and socioeconomic opportunities. Initially, the focus was primarily on whether individuals or communities had access to devices and the internet. However, the concept now encompasses broader issues, such as the unequal distribution of information and communication technologies (ICTs) among different groups based on demographics, education levels, and geographic location (Van Dijk, 2020; Lupač, 2018). Today, the digital divide reflects disparities between urban and rural populations, industrialized and developing nations, and educated and uneducated groups. These inequalities emphasize the need for more inclusive policies to ensure that everyone can access and benefit from modern digital advancements.

❑ Evolving digital inequities

4.3.3 Evolution of Digital Inequities

The evolution of digital inequities has transitioned from a binary view of access to technology to a more nuanced understanding that includes quality of access, digital skills, and the outcomes associated with technology use (Van Dijk, 2020; Lupač, 2018). Initially focused on those without internet access, contemporary discussions now address how even included groups can face inequalities, particularly in regions like the global South where digital systems can exacerbate existing socio-economic disparities (Trappel, 2019; Laskar, 2023). This shift manifests that technological advancement does not inherently lead to equality; instead, it often reinforces existing inequalities through mechanisms like data control and econom-



ic exploitation (Castells, 2001). The digital divide evolved through several distinct phases from the 1980s to the early 2000s (Servon, 2002; Ferro, 2010).

4.3.3.1 Early Stages (1980s-1990s)

❑ Early digital divide focus

In the early stages of the digital divide, particularly during the 1980s and 1990s, the focus was primarily on disparities in computer ownership and personal computer access (Servon, 2002). As the 1990s progressed, the concept expanded beyond traditional information inequality to address the emerging divide related to computer and internet access (Van Dijk, 2020). By the mid-1990s, the National Telecommunications and Information Administration (NTIA) began conducting surveys that revealed significant gaps in technology access, highlighting the growing need for initiatives to bridge these disparities (Ferro, 2010).

4.3.3.2 Conceptual Expansion (Late 1990s-2010)

❑ Evolution of digital divide

Between the late 1990s and 2010, the digital divide shifted from a simple binary issue of access versus non-access to a more nuanced, multi-layered phenomenon (Van Dijk, 2020; Lupač, 2018). The first level focused on physical access to technology, ensuring that people had the necessary devices, internet connectivity, and infrastructure to participate in the digital world (Ferro, 2010). The second level emphasized skills and digital engagement, acknowledging that simply having access to technology wasn't enough; individuals needed to develop digital literacy and actively engage with technology (Servon, 2002). The third level expanded the concept to include the ability to leverage technology for meaningful outcomes, recognizing that access and skills alone aren't sufficient—people need to use technology in ways that improve their lives, whether through enhanced educational opportunities, economic advancement, or social participation (Castells, 2001; Trappel, 2019). This shift highlighted that bridging the digital divide required not just providing tools, but also ensuring that individuals could effectively use them to create real-world change (Monti & Wacks, 2020).

4.3.3.3 Broader Understanding (2000-2015)

Between 2000 and 2015, the digital divide expanded to encompass a broader range of factors, including disparities

❑ Broader digital disparities

between urban and rural populations, educated and uneducated groups, and different socioeconomic levels (Laskar, 2023; Trappel, 2019). Variations in technological skills also became a main factor, as some individuals lacked the knowledge to fully utilize new technologies (Servon, 2002; Van Dijk, 2020). Global disparities between developed and developing countries became more pronounced, with access to technology often more limited in less wealthy regions (Castells, 2001; Lupač, 2018). Each technological innovation—from narrow-band internet to mobile phones and broadband—temporarily redefined the digital divide, as new technologies both created new gaps and offered new opportunities, continuously shifting the landscape of digital inclusion (Ferro, 2010; Monti & Wacks, 2020).

4.3.4 Dimensions of Digital Divide

The digital divide has three main parts: the access divide, where some people can't afford or get technology; the usage divide, where people have different levels of skill in using technology; and the quality-of-use divide, where not everyone can use digital tools effectively. This divide affects important opportunities like education, jobs, and moving up in life, often making it harder for disadvantaged groups to succeed.

i. Access Divide

❑ Access Divide challenges

The Access Divide is part of the digital divide and refers to the gap between people who can use technology like the internet and those who cannot. This problem is bigger in remote and rural areas, where proper internet infrastructure is often missing, putting these communities at a disadvantage compared to cities. People with low incomes also face challenges because they cannot afford devices like smartphones or computers or pay for internet access. In some places, even basic infrastructure, like reliable internet connections or community centers with technology, is unavailable.

❑ Addressing Access Divide

This issue is not just about having internet or devices but also includes whether people can afford to use them regularly or access them through schools or public centers. The Access Divide is much worse in developing countries compared to wealthier ones, showing how uneven access to technology is across the world. Solving this problem means addressing both the physical and financial barriers to ensure everyone can benefit from technology.

ii. Usage Divide

The usage divide is part of the digital divide that focuses on how people use technology, not just whether they have access to it. Some people can easily use the internet and digital tools, while others struggle due to a lack of skills or confidence. This problem affects people based on their age, education, income, and location. For example, someone may own a mobile phone but only know how to make calls, not how to send emails or use apps. This divide shows that simply giving people technology isn't enough; they also need the knowledge and skills to use it effectively.

❑ Lack of Digital Skills

One big reason for the usage divide is a lack of digital skills. Many people haven't learned how to use technology properly, so they can't do simple tasks like attaching a file to an email. People with less money or education often miss out on digital training, making it harder for them to use technology. Older adults also face challenges because they didn't grow up with digital tools, unlike younger generations who use technology more comfortably and frequently.

❑ Lack of Digital Skills

The usage divide impacts people in different ways. Younger generations are more likely to use social media, apps, and online learning platforms, while older adults often struggle with basic tasks like using a smartphone or computer. This can leave older people feeling isolated and unable to access important services like healthcare or job opportunities. Bridging the usage divide means teaching everyone how to use technology confidently and effectively so that no one is left behind in today's digital world.

❑ Usage Divide and Generational Gaps

iii. The quality-of-use divide

The quality-of-use divide refers to a gap where people have access to technology and basic digital skills but struggle to use digital tools effectively. For example, some might find it hard to locate reliable information online, use technology to grow professionally, or evaluate content critically. This shows that having technology isn't enough; people need the ability to engage with it meaningfully. This divide highlights the importance of digital literacy and understanding how to use technology strategically to maximize its benefits.

❑ Quality-of-Use Divide and Digital Literacy

One major cause of this divide is insufficient digital skills and literacy. Some people lack the knowledge to navigate the

❑ Causes of the Quality-of-Use Divide

digital world effectively, such as searching for information, evaluating sources, or using online tools for learning or work. Socioeconomic factors like income and education also play a big role. For instance, people from lower-income backgrounds often have less access to quality training, and those in rural areas may face connectivity issues that limit their technological experience.

❑ Impacts of the Quality-of-Use Divide

The impacts of the quality-of-use divide are far-reaching. It makes it harder for people to get better jobs, as over 80% of middle-skill jobs require digital proficiency (Van Dijk, 2020). This divide is not just a personal issue; it widens gaps between communities, affecting underrepresented groups like non-white, rural, and impoverished populations (Trappel, 2019; Lupač, 2018). It can also deepen inequalities between developed and developing countries, creating a two-tiered society where some people are left out of the digital world entirely (Castells, 2001; Laskar, 2023). In the long term, this divide creates systemic challenges. It limits career and educational opportunities, reduces economic growth, and perpetuates cycles of inequality. For society to move forward, we must bridge the quality-of-use divide by ensuring that everyone—not just those with access—has the skills to use technology effectively. This will help create a fairer and more connected world where no one is left behind.

Forest Trekking for Digital Education

In Kerala's remote tribal regions like Attappadi and Edamalakkudy, Kudumbashree volunteers trekked through dense forests for kilometers just to teach digital skills. They even used offline video lessons in local languages, bringing technology to places no internet could reach!

4.3.5 Main Causes of Digital Divide

The digital divide is a complex issue fueled by various interconnected factors, including infrastructure barriers, socioeconomic disparities, demographic challenges, digital literacy gaps, and geographic limitations. These factors collectively create significant inequalities in accessing and utilizing technology, impacting education, jobs, and overall opportunities across different populations.

i. Infrastructure Barriers

❑ Infrastructure challenges driving the digital divide

The digital divide is largely driven by infrastructure challenges that prevent people from accessing or using technology. Remote and rural areas often lack reliable internet because building networks like broadband, fiber optics, or 5G is expensive and difficult, especially in regions with poor electricity infrastructure (Laskar, 2023; Ferro, 2010). These issues create significant problems, such as children missing out on online education, people being unable to work remotely, and vulnerable groups like low-income families and older adults facing additional hardships (Servon, 2002; Trappel, 2019). Globally, the divide is stark—for instance, while 91% of Europeans have internet access, only 38% of Africans are connected (Van Dijk, 2020; Castells, 2001). Addressing these gaps requires governments, businesses, and communities to invest in better infrastructure and adopt new technologies like 5G to improve education, healthcare, and job opportunities for everyone (Monti & Wacks, 2020; Lupač, 2018).

ii. Socioeconomic Factors

❑ Digital divide harms education and jobs

The digital divide is a big problem because it makes it hard for many people, especially those with less money, to access technology. Families with low incomes often can't afford devices or the internet, which affects their ability to learn online (Servon, 2002; Lupač, 2018). About 17% of students can't finish homework due to poor internet access, and groups like American Indian, Black, and Hispanic students face the worst challenges, with up to 27% of students in some communities lacking internet access (Van Dijk, 2020; Trappel, 2019). This problem also affects jobs and education. Most jobs today need people to know how to use technology, but without internet or digital skills, many miss out on good opportunities (Castells, 2001; Monti & Wacks, 2020). This increases poverty and makes life harder for these families. In school, students without proper access struggle to keep up, take longer to finish work, and fall behind their peers, making it harder for them to succeed in the future (Laskar, 2023; Ferro, 2010).

iii. Demographic Challenges

Demographic challenges play a significant role in the digital divide, with age-related gaps being a major issue—44% of people over 65 lack internet access, limiting their ability to

❑ Demographics affect digital access

benefit from digital tools (Van Dijk, 2020; Lupač, 2018). Racial and cultural barriers also contribute, as marginalized groups often face unequal access to technology and resources (Trappel, 2019; Servon, 2002). Also, language limitations in digital content make it harder for non-native speakers to navigate online platforms, further excluding them from opportunities in education, work, and healthcare (Castells, 2001; Laskar, 2023). Addressing these challenges requires creating inclusive digital resources and ensuring equitable access for all age groups, cultures, and languages (Ferro, 2010; Monti & Wacks, 2020).

iv. Digital Literacy Issues

❑ Digital literacy gap

Digital literacy issues significantly contribute to the digital divide. Many people lack sufficient training in digital skills, making it difficult for them to use technology effectively. Generational differences also play a role, as older individuals often struggle to understand and adapt to modern technology compared to younger generations. Many are unaware of how technology can benefit their lives, which discourages them from learning or using it. Addressing these gaps requires widespread digital education programs and efforts to raise awareness about the advantages of technology for all age groups.

v. Geographic Limitations

❑ Urban-rural internet gap

The digital divide between urban and rural areas is still a big challenge around the world. In 2023, only 50% of rural residents had internet access, compared to 81% of urban residents. This gap is even worse in low-income countries, where just 17% of rural people can connect to the internet. In these areas, the difference in internet access between urban and rural places can be as high as 71 percentage points. High-income countries, on the other hand, have mostly closed this gap (Laskar, 2023; Van Dijk, 2020; Trappel, 2019).

❑ Rural India lacks broadband

In India, the situation is a mix of progress and challenges. Rural India actually has more internet users (227 million) than urban areas, but broadband access is still uneven. While 93% of urban areas have broadband, only 29.3% of rural areas do. Many rural areas rely on mobile internet instead of proper broadband connections, which can limit what they can do online (Laskar, 2023; Van Dijk, 2020).



❑ Rural India's internet growth

India's internet usage shows clear differences between urban and rural areas, but rural regions are catching up fast. Out of 504 million internet users, rural areas account for 45% of mobile data usage, while urban areas use 55%. For every 100 people, rural areas have only about 28 subscribers compared to 117 in urban areas. Some states, like Kerala, Karnataka, and Rajasthan, have full internet coverage in cities. Exciting trends show that rural areas will contribute 56% of new internet users by 2025, with women making up 65% of these new users. Affordable smartphones, telecom companies like Jio and Airtel, more content in local languages, and the pandemic have all helped boost rural internet use, though a gap still exists (Laskar, 2023; Castells, 2001; Van Dijk, 2020).

The Bank Queue Problem that Started a Revolution!

Kerala's state-wide digital literacy revolution started in Pullampara village when officials saw daily-wage laborers losing whole days of income standing in bank queues. This sparked a mission to teach digital banking skills, turning a simple problem into a movement that changed the way people manage money!

4.3.6 Elderly people and Digital Divide

❑ Ageism and digital divide

The digital divide is a big problem for elderly people, as many of them don't use the internet. One in four adults over 65 don't use the internet at all. There are many reasons for this. First, some seniors are afraid of new technology, thinking it's too hard to use. Others have physical issues, like arthritis or poor eyesight, which make it hard to use devices. Some also feel they don't need technology because they've lived without it for so long. On top of that, many elderly people don't have enough money to buy the devices they need, and the large amount of information online can be overwhelming, making it harder for them to learn. Ageism, or negative attitudes toward older people, also plays a role in the digital divide. Older adults are sometimes seen as not being good with technology or unwilling to learn, which can make them feel discouraged. These stereotypes can make it harder for them to access the support and training they need to feel comfortable using digital tools (Van Dijk, 2020; Lupač, 2018). As a result, they may feel left

out and less motivated to try using the internet, which increases the gap between younger and older generations when it comes to technology (Trappel, 2019; Servon, 2002).

To help older adults overcome these challenges, there are several strategies that can be very effective. Providing affordable internet and devices that are easy to use is important. Offering training programs, both online and in person, can help seniors build the skills and confidence they need. Creating technology that is designed to be easy for older people to use, such as larger buttons and simple instructions, is also helpful. Encouraging younger people to help older adults learn technology can be a great way to reduce age-related stereotypes and build relationships. Addressing health issues that make it difficult for seniors to use technology can also help them engage more fully with the digital world. These strategies can help bridge the digital divide and include older adults in the growing world of technology.

❑ Strategies to help seniors overcome digital divide

4.3.7 Digital Divide in Rural Areas

The digital divide is a big problem in rural areas, especially in places like India, where only 24% of rural households have internet access, compared to 66% in urban areas (Laskar, 2023). This gap makes it harder for people in rural communities to access important services like education and job opportunities. Without the internet, students can't use online resources or participate in remote learning, which affects their grades and future chances of getting a job (Servon, 2002; Van Dijk, 2020). Teachers also struggle to use technology in their lessons, which lowers the quality of education in these areas (Trappel, 2019). Moreover, people in rural areas often don't have computers, and many don't know how to use them, which makes it even harder to catch up with the digital world (Ferro, 2010; Castells, 2001).

❑ Rural digital divide challenges

This lack of technology affects not just students but also their teachers, who can't use digital tools to make lessons more interesting and effective. As a result, students in these communities miss out on learning important skills that are needed for modern jobs. This creates a cycle where people in rural areas remain stuck in low-paying jobs and poor educational conditions. Women in rural areas are especially affected, as they often have fewer opportunities to use technology, which makes it even harder for them to break out of traditional roles and find better work.

❑ Technology gap impacts education and job opportunities



The Power of Community Radios

Did you know that community radios are a powerful way to amplify local voices and drive social change? These non-commercial stations focus on issues that truly matter to their communities, providing content that reflects local culture and concerns. Often run by passionate volunteers, community radios are especially vital in rural areas, helping connect people with larger media outlets and offering a platform for underrepresented groups. By fostering a sense of unity, community radios empower individuals and help create positive change on a local level!

❑ Overcoming digital exclusion

Despite these challenges, some rural communities have found creative ways to overcome digital exclusion. For example, in Kuhmo Village, Finland, a cooperative worked together to build a long fiber optic network, improving internet access for everyone in the village (Ferro, 2010). In Superfast Cornwall, UK, local people were trained to become "Digital Champions," helping others learn how to use technology (Trappel, 2019). Another example is Mobile Schools on Wheels in India, where classrooms with computers travel to remote areas to teach digital skills to students who would otherwise have no access to technology (Laskar, 2023; Servon, 2002).

These examples show that when communities work together and create solutions that fit their needs, they can overcome the digital divide and help everyone gain access to the digital world. With the right support, rural areas can bridge the gap and give people the tools they need to succeed.

4.3.8 Understanding the Digital Divide of People with Disabilities

The digital divide poses significant challenges for people with disabilities, limiting their access to technology and the opportunities it offers (Van Dijk, 2020; Lupač, 2018). High costs of devices and internet connections prevent many from owning computers or smartphones, with only 62% of adults with disabilities having a computer compared to 81% of those without disabilities (Servon, 2002; Trappel, 2019). Additionally, many websites and apps are not designed to work well with tools like screen readers, and public internet spaces often lack physical accessibility (Ferro, 2010; Castells, 2001). As a result,

❑ Digital divide challenges for people with disabilities

15% of people with disabilities never go online, missing out on education, jobs, and social connections (Monti & Wacks, 2020).

❑ Efforts to bridge the digital divide for people with disabilities

Efforts to address these barriers include programs like Microsoft's Accessibility Insights, which help developers create inclusive websites and apps, as well as smart technologies like voice recognition and screen readers (Ferro, 2010; Servon, 2002). Organizations like UNICEF advocate for involving people with disabilities in designing accessible digital tools (Monti & Wacks, 2020; Trappel, 2019). To fully bridge this gap, it is essential to lower the cost of technology, improve digital literacy, ensure all websites and apps are accessible, and enforce policies that promote inclusivity (Van Dijk, 2020; Laskar, 2023). By doing so, we can create a more equitable digital world where everyone, including people with disabilities, can thrive (Castells, 2001; Lupač, 2018).

4.3.9 Digital Divide and Ethnic/Racial Minorities

❑ Digital divide challenges for minority ethnic groups

The digital divide creates serious challenges for many minority ethnic groups, especially when it comes to accessing the internet and digital technology (Van Dijk, 2020; Lupač, 2018). Many families struggle with limited financial resources, which makes it hard to afford devices or internet services. For example, only 54% of low-income families have home internet, compared to 90% of high-income families (Servon, 2002; Trappel, 2019). Language barriers and low digital skills also make it harder for some groups to use technology, especially when online content is not designed for diverse cultures or non-native speakers (Castells, 2001; Laskar, 2023).

The Centenarian Surfer of Kerala

In Kerala, M.A. Abdullah Maulavi, a remarkable 105-year-old, taught himself to use a smartphone during the COVID-19 lockdown! Missing his daily newspaper, he first learned to watch news on YouTube and soon mastered Facebook, WhatsApp, video calls, and internet browsing—with a little help from his granddaughter and Digi Kerala volunteers. He became a true centenarian tech explorer! (*Source: TNIE*)



The digital divide affects more than just internet access—it impacts education, jobs, and even healthcare. For example, many minority groups find it difficult to access important health information online due to a "triple disadvantage" of low digital access, low digital skills, and financial challenges. These barriers create a cycle where minority communities are left out of the benefits that digital technology can provide, like better learning opportunities and access to jobs.

❑ Digital divide's impact on education, jobs, and healthcare for minority groups

To solve this problem, we need to address issues like high internet costs, a lack of training for using technology, and cultural norms that discourage using digital tools. By creating more affordable and inclusive solutions, such as training programs and online content in different languages, we can help ensure everyone has a fair chance to connect, learn, and grow in the digital world.

4.3.10 The Digital Divide and COVID-19

The COVID-19 pandemic showed how important it is for everyone to have access to the internet and technology. Many people, especially in rural and poor areas, couldn't join online classes because they didn't have computers or the internet. Schools in poorer areas struggled the most with remote learning. Students of colour, those with disabilities, and families in rural areas faced the hardest challenges. Without the internet, it became harder for many people to get healthcare, work from home, or stay connected to others, making the gap between people with and without technology even bigger. This shows that everyone needs equal access to technology to succeed in life.

❑ COVID-19 highlighted the need for equal access to technology

In India, the pandemic highlighted a serious digital divide (Laskar, 2023; Van Dijk, 2020). Only 20% of children could access online education, leaving 60% without any learning at all. The poorest households were hit the hardest—only 2.7% had computers and 8.9% had internet access (Servon, 2002; Ferro, 2010). This made learning very difficult for millions of children. In healthcare, the digital divide was also clear. The CoWIN app for vaccine registration worked much better for people in cities than in rural areas. In cities, there were 30 vaccine doses for every 100 people, while rural areas only had 12.7 doses per 100 people (Monti & Wacks, 2020; Trappel, 2019).

❑ Digital divide in India during COVID-19

Vulnerable groups like rural communities, low-income families, women, and people who didn't know how to use technology faced even bigger challenges. The pandemic made it clear

❑ Digital access is essential for equality

that digital access isn't just a convenience—it's necessary for education, healthcare, and being a part of society. This showed how important it is to improve digital infrastructure and make sure everyone has equal access to technology. If we don't do this, the digital divide will continue to make inequality worse for many people.

4.3.11 Bridging the Digital Divide

❑ Global efforts to close the digital divide

Countries around the world are working hard to close the digital divide, which means making sure everyone has access to technology and the internet (Van Dijk, 2020; Lupač, 2018). In places like South Korea, the government has invested in fast and affordable internet for everyone. They've also made sure schools teach kids how to use technology, and they've used technology to make cities smarter and more efficient (Castells, 2001; Trappel, 2019). Estonia has also made big strides by allowing people to vote and manage health records online through a secure system. Their strong internet network and digital tools have made them one of the most advanced digital countries (Monti & Wacks, 2020; Ferro, 2010).

❑ Initiatives to close the digital divide in India and Uruguay

India is focusing on bringing technology to rural areas through its Digital India program, which makes smartphones and internet data cheaper (Laskar, 2023; Van Dijk, 2020). The government is also building a big network to provide high-speed internet to villages, while programs like Skill India teach people how to use technology for work and learning (Servon, 2002; Castells, 2001). Uruguay is ensuring that children have access to technology by giving laptops to students in public schools through the One Laptop per Child program, helping them use technology for their education (Ferro, 2010; Trappel, 2019). These countries are showing how teamwork and planning can help close the digital divide, making technology accessible to everyone (Monti & Wacks, 2020; Lupač, 2018).

Summarised Overview

In this chapter, we examined the digital divide and its role in shaping contemporary inequalities, defining it as a gap in digital access, usage, and quality of use that affects education, healthcare, and employment opportunities. Tracing its evolution from early disparities in telephone access to today's complex digital inequities, it highlighted persistent challenges in bridging technological gaps. The divide was analyzed across three dimensions—access, usage, and quality of use—showing its impact on disadvantaged groups, with infrastructure barriers, socio-economic challenges, digital literacy gaps, and geographic disparities identified as key causes. Special attention was given to the struggles of elderly populations and low-income communities in adopting digital technologies. Global and regional trends, including India's urban-rural divide, illustrated the unequal pace of digital inclusion despite progress in rural areas. The chapter concluded by emphasizing the importance of multi-level strategies, including policy reforms, technological innovations, and targeted education programs, to promote inclusivity and ensure equitable digital access for all.

Self-Assessment Questions

1. What is the digital divide, and why is it a global concern?
2. How has the focus of the digital divide evolved over the decades?
3. What are the key differences between the access, usage, and quality-of-use divides?
4. Can you identify three causes of the digital divide?
5. How do infrastructure challenges exacerbate the digital divide in rural areas?
6. What role does digital literacy play in bridging or widening the digital divide?
7. How does the digital divide specifically affect elderly individuals?
8. What measures can governments take to reduce the digital divide in underserved regions?
9. How can emerging technologies, such as 5G, help reduce global digital inequities?

Assignments

1. Define the digital divide. How does it affect education, employment, and health-care?
2. Discuss the historical evolution of the digital divide from the 1980s to the 2010s.
3. Explain the three main dimensions of the digital divide and provide examples of each.
4. Analyze the role of infrastructure barriers in perpetuating the digital divide.
5. Discuss the socio-economic and demographic challenges contributing to digital inequities.
6. Examine how digital literacy issues deepen the digital divide. What measures can address this?
7. Describe the specific challenges faced by elderly people regarding digital access and usage.
8. How does the digital divide differ between urban and rural populations in India? Provide statistics to support your answer.

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Suggested Reading

1. Seeletso, M. K. (2022). Social exclusion and the digital divide. In *Cambridge University Press eBooks* (pp. 34–44). <https://doi.org/10.1017/9781108979146.006>
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Space for Learner Engagement for Objective Questions

Learners are encouraged to develop objective questions based on the content in the paragraph as a sign of their comprehension of the content. The Learners may reflect on the recap bullets and relate their understanding with the narrative in order to frame objective questions from the given text. The University expects that 1 - 2 questions are developed for each paragraph. The space given below can be used for listing the questions.

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MODEL QUESTION PAPER SETS

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QP CODE:

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THIRD SEMESTER MA POLITICAL SCIENCE EXAMINATION
DISCIPLINE SPECIFIC ELECTIVE COURSE
M23PS02DE – SOCIAL EXCLUSION: THEORY AND PRACTICE
SET-1

Time: 3 Hours

Max Marks: 70

SECTION A

Answer any **ten** questions in a word or a sentence. Each question carries **one** mark.

(10 × 1 = 10 Marks)

1. Define *social exclusion*.
2. Who introduced the concept of “capability deprivation”?
3. Name one theory explaining the causes of social exclusion.
4. What is meant by marginalization?
5. Mention one constitutional article prohibiting discrimination in India.
6. What is affirmative action?
7. What do you mean by political exclusion?
8. Give one example of economic marginalization.
9. Mention one institutional mechanism ensuring social justice in India.
10. Define *caste-based exclusion*.
11. What does EWS stand for?
12. Name one constitutional body promoting women’s empowerment.
13. What is the full form of LGBTQ+?
14. Define *digital divide*.
15. Who are “migrants” in the context of social exclusion?



SECTION B

Answer any five questions in two or three sentences. Each question carries two marks.

(5 × 2 = 10 Marks)

16. Distinguish between social exclusion and inequality.
17. Explain the role of Amartya Sen in theorizing social exclusion.
18. How does political marginalization affect democratic participation?
19. Explain the economic perspective of marginalization.
20. What is the role of the National Human Rights Commission in reducing exclusion?
21. Describe how caste acts as a determinant of exclusion in India.
22. Explain the constitutional provision ensuring reservation for women in local bodies.
23. How is religion linked to social exclusion in India?
24. Explain how urban spaces reflect socio-spatial exclusion.
25. What is meant by “digital inclusion”?

SECTION C

Answer any five questions. Each question carries four marks.

(5 × 4 = 20 Marks)

26. Discuss major theories of social exclusion.
27. Explain the debates surrounding marginalization in India.
28. Examine the role of Directive Principles of State Policy in combating exclusion.
29. Analyze political exclusion with suitable examples.
30. Explain the gender dimension of social exclusion.
31. Discuss the constitutional mechanisms available for affirmative action.
32. How are migrants affected by social exclusion in urban India?
33. Examine the challenges faced by LGBTQ+ communities in accessing rights.

SECTION D

Answer any three questions. Each question carries ten marks.

(3 × 10 = 30 Marks)

34. Critically evaluate different theoretical perspectives on social exclusion.
35. Examine the interrelationship between caste, gender, and religion in shaping social exclusion in India.
36. Analyze the economic dimensions of exclusion with special reference to EWS.
37. Discuss the issue of representation of marginalized communities in political institutions.
38. Evaluate the effectiveness of constitutional and institutional mechanisms in promoting social inclusion.
39. Examine emerging forms of social exclusion in the digital era.



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M23PS02DE – SOCIAL EXCLUSION: THEORY AND PRACTICE
SET-2

Time: 3 Hours

Max Marks: 70

SECTION A

Answer any **ten** questions in a word or a sentence. Each question carries **one** mark.

(10 × 1 = 10 Marks)

1. Who coined the term *social exclusion*?
2. Define *inclusion*.
3. What is the main objective of affirmative action?
4. State one political consequence of social exclusion.
5. Mention one socio-economic indicator of marginalization.
6. What is *institutional discrimination*?
7. Name one article of the Constitution ensuring equality before law.
8. Define *economic exclusion*.
9. What is *positive discrimination*?
10. Name one government scheme addressing caste-based exclusion.
11. What is meant by *reservation in promotion*?
12. Define *spatial segregation*.
13. Mention one constitutional safeguard for minorities.
14. What is meant by *gender marginalization*?
15. Give one example of digital empowerment initiative in India.?

SECTION B

Answer any **five** questions in two or three sentences. Each question carries **two** marks.

(5 × 2 = 10 Marks)

16. Differentiate between social exclusion and social inclusion.
17. How does economic policy contribute to exclusion?
18. Explain the political perspective of marginalization.



19. What are the key features of the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act?
20. Explain the role of the National Commission for Minorities.
21. Describe the relationship between religion and marginalization.
22. Explain how EWS reservation attempts to reduce exclusion.
23. What do you understand by the term “representation deficit”?
24. Explain the link between migration and social security.
25. What challenges does the LGBTQ+ community face in employment?

SECTION C

Answer any five questions. Each question carries four marks.

(5 × 4 = 20 Marks)

26. Discuss the capability approach in relation to social exclusion.
27. Explain the social and economic implications of marginalization.
28. Analyze the functioning of institutional mechanisms for social justice in India.
29. Examine the intersection of caste and gender in exclusionary practices.
30. Discuss how religion influences social and political exclusion.
31. Analyze the spatial dimension of exclusion in rural and urban India.
32. Evaluate affirmative action policies and their outcomes.
33. Discuss the digital divide as an emerging challenge to inclusive governance.

SECTION D

Answer any three questions. Each question carries ten marks.

(3 × 10 = 30 Marks)

34. Critically examine the evolution of social exclusion as a theoretical framework.
35. Discuss the various forms and patterns of marginalization in Indian society.
36. Evaluate the constitutional and institutional mechanisms that aim to counter social exclusion.
37. Analyze the interconnections between caste, gender, and religion in the practice of affirmative action.
38. Examine the issue of representation of marginalized groups in governance and policymaking.
39. Discuss the challenges and prospects of inclusion in the context of migration, LGBTQ+ rights, and the digital divide.

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BE TOO LATE**

SAY NO TO DRUGS

**LOVE YOURSELF
AND ALWAYS BE
HEALTHY**



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