Caste and Social Exclusion in India

SELF LEARNING MATERIAL

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Caste and Social Exclusion in India
Course Code: M21HS04DE
Semester - III

Discipline Specific Elective Course
Postgraduate Programme in History
Self Learning Material

(With Model Question Paper Sets)

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DOCUMENTATION

Academic Committee

Dr. M. T. Narayanan
Dr. Vijayakumari K.
Dr. C. Haridas
Dr. Sri Parvathi
Dr. Shaji A.
Dr. E.K. Rajan

Dr. K. S. Madhvan
Muhammedali T.
Dr. K. P. Rajesh
Dr. Muhammed Maheen A.
Dr. Deepu J. S.

Development of the Content

Dr. G. Sreenivasan, Dr. P. Suresh Kumar

Review

Content   : Dr. Biju R.I.
Format   : Dr. I.G. Shibi
Linguistics : Sujith Mohan

Edit

Dr. Biju R.I.

Scrutiny

Dr. Preethi Chandran P.B., Dr. Arun A.S., Thahani Rezak.,
Dr. Reeja R., Zubin Antony Mehar Reynold

Co-ordination

Dr. I.G. Shibi and Team SLM

Design Control

Azeem Babu T.A.

Cover Design

Jobin J.

Production

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Warm regards.
Dr. Jagathy Raj V. P.   01-09-2024

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Caste: Ideology and Practice

BLOCK-01

UNIT 1

Caste and Social Stratification

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

- ◆ analyse European perceptions of the caste system during the colonial era
- ◆ compare and contrast racial and occupational theories of caste
- ◆ evaluate Louis Dumont's structuralist approach to caste hierarchy
- ◆ assess recent approaches to caste through social exclusion and social history frameworks

Background

In 2016, protests erupted across India after a Dalit student named Rohith Vemula committed suicide at the University of Hyderabad. In his suicide note, Vemula wrote about the discrimination and isolation he faced as a Dalit in academia. His death sparked nationwide debates about caste discrimination in modern India and reignited discussions about the persistence of the caste system. This incident highlights how caste continues to be a contentious and influential force in Indian society, even as the country progresses economically and technologically in the 21st century. The caste system has been a defining feature of social organisation in India for over two millennia. It has structured social relations, economic activities and cultural practices across the subcontinent. Despite being officially abolished after India gained independence, caste identity and caste-based discrimination persist in various forms. Understanding the caste system and its evolution is crucial for comprehending Indian society, politics and culture.

This unit will explore the concept of caste and its role in social stratification in India. We will examine how European scholars and administrators perceived and theorised about the caste system during the colonial era. We will also look at racial and occupational theories of caste that emerged in the 19th and early 20th centuries. Louis Dumont's influential work on caste hierarchy will be analysed. Finally, we will explore more recent approaches that view caste through the lens of social exclusion and social history. By the end of this unit, you will have a nuanced understanding of caste as a system of social stratification and the various ways it has been conceptualised by

scholars over time. You will be able to critically analyse different theories of caste and comprehend how caste intersects with other forms of social inequality. This knowledge will provide a strong foundation for further study of Indian society and comparative social systems.

Keywords

Varna, Jati, Hierarchy, Endogamy, Purity-pollution, Orientalism, Scientific Racism, Structuralism

Discussion

Caste System and *Varna* System

▶ *Caste and varna system*

The term 'caste' originated from Portuguese casta meaning breed or race. It has two meanings in Indian context- caste as *varna* and caste as *jati*. Caste is indeed a closed system of social stratification which existed in India among the Hindu society. Its exact origin is still unknown. The *Varna* system, often regarded as the precursor to the caste system, is referenced in early Vedic texts. However, historians argue that the rigid caste system evolved over time, influenced by social, economic and colonial factors.

▶ *Division of varna system*

According to the *Varna* system, the Hindu society was divided into four groups or *Varnas*: *Brahmin*, *Kshatriya*, *Vaishyas* and Avarna. In the early Vedic period, *varna* was likely more flexible and based on function or occupation rather than strictly by birth. It later became hereditary. In the early Vedic period, the term '*varna*' was originally used for colour. During the beginning, there were only three *varnas* and later the Sudras were also added. At the initial stage, the occupational division was not rigid. In addition to these, a fifth group also emerged outside the *varna* system. They were called '*Avarna*' or outcaste or untouchable. The *Avarna* was subjected to grave discrimination in society. *Varna* is a broader conceptual framework, whereas caste or *jati* represents the lived reality. The *Varnas* are only four but there are around 3000 castes and sub-castes in India. Beteille defines certain characteristics of caste system- endogamy, hereditary membership, specific style of life, particular occupation, distinct ritual status, endogamy, followed by ritual purity and pollution rules.

1.1.1 European Perceptions of Caste

C.J. Fuller, N.B. Dirks and S.S. Jodhka opine that caste system is a construct of colonisers to establish categories in India. European colonisers encountered India's caste system and made numerous attempts to understand and categorise this unfamiliar social structure. European perceptions of caste evolved over time and were shaped by prevailing intellectual trends as well as colonial imperatives. European perceptions of caste are significant for the study of the caste system. G.W.F. Hegel viewed India on his civilisation scale, only next to China because of the break between state and society produced by caste here. According to him, caste resisted not just despotism, but also many meaningful exchanges between social and political developments. Therefore, caste fails to establish a relationship with history and India remains a dreamlike state that necessitated its subjugation to Europe.

Hegel confirmed two ideas: first, the British colonial belief that India had no history. The second one was that the entire force of the caste system was to hinder political development. Hegel also naturalised the establishment of a sociological view of India that went well beyond the specific claims of colonial representation. Hegel's analysis reinforced colonial narratives that India lacked history, aligning with European intellectual trends of the time. Writings of Karl Marx on India in his development of a theory of Asiatic mode of production also drew on colonial sociology. At the same time, it was more with respect to the village community and kept an associated view of despotism with respect to caste. This was the fact while Marx was critical of British imperial rule.

1.1.1.1 Early European Travellers' Accounts

Some of the earliest European accounts of the caste system came from travellers and merchants who visited India in the medieval and early modern periods. Portuguese explorer Duarte Barbosa, who travelled to India in the early 16th century, provided one of the early detailed European descriptions of the caste system. He noted the hereditary nature of occupations and the strict rules governing inter-caste interactions and marriages. Other early travellers like Francois Bernier in the 17th century also commented on the rigid social divisions they observed in Indian society. These early accounts, while providing valuable observations, often reflected misconceptions and ethnocentric biases of the European writers. They tended to view caste primarily through the lens of religious beliefs and practices rather than as a social system.

1.1.1.2 Colonial Era Perceptions

With the establishment of colonial rule in India, European

administrators and scholars began more systematic attempts to study and classify Indian society. The caste system posed a challenge to European notions of social organisation and progress. Many colonial officials viewed it as an irrational, regressive system that needed to be reformed. James Mill's influential work "The History of British India" (1817) presented a highly critical view of Indian civilisation and the caste system. Mill argued that the caste system was a major impediment to India's progress and that British rule was necessary to modernise Indian society. This perspective justified colonial intervention in Indian social affairs. At the same time, some colonial scholars developed a more romanticised view of caste as an ancient system that had maintained social stability in India for millennia. They saw caste as a unique feature of Indian civilisation that needed to be preserved. This perspective sometimes led to policies that reinforced caste distinctions. Max Weber and Bouglé analysed Indian society, often portraying it as a closed system with minimal social mobility, a perspective critiqued by later scholars for its orientalist assumptions.

▶ Colonial scholarly perspectives

1.1.1.3 Census and Ethnographic Studies

The colonial state's efforts to enumerate and classify the Indian population through decennial censuses from 1872 onwards had a significant impact on how caste was understood and operationalised. Census officials struggled with how to categorise the numerous *jati*s (endogamous groups) they encountered into a coherent system. H.H. Risley, who oversaw the 1901 census, attempted to develop a systematic classification of castes based on social precedence. This involved ranking castes in order of perceived social status. Such efforts to enumerate and rank castes ended up reifying caste identities and distinctions in new ways. Alongside the census, colonial ethnographers like Herbert Hope Risley conducted extensive studies of caste groups, documenting their customs, occupations and supposed racial characteristics. These studies contributed to the development of theories linking caste to race.

▶ Census and caste classifications

H.H. Risley was the Census Commissioner of India for 1901 Census. The rise of caste system is well documented in Risley's classic work, "The People of India". Even though caste system with its formation is written in many texts, perhaps nowhere one finds it more fully and clearly than Risley's work. In this regard, Risley was criticised by several contemporary as well as subsequent writers. His most important critic was William Crook. Researches of the anthropological scholars made clear that racial types in India were neither as pure or clear as Risley had assumed. Caste has a complex and multifaceted status in Risley's view. According to him, caste

▶ Risley's caste interpretations

is religious as well as a social institution. At the same time, it is pluralistic. Risley wrote that castes may in course of time group themselves into classes representing the different strata of society. Risley suggested that caste, as he interpreted it, could evolve into a virtue born out of necessity.

Risley's lasting influence

It is noteworthy that Risley's work united official and academic knowledge. Further, it revealed the extent to which basic understandings of caste and of India were tied to colonial period and the overpowering and yet divisive force of caste as a social principle. Risley's work has influenced Western academic perspectives on India, though many of his theories, particularly those linking caste to race, have been widely critiqued.

1.1.1.4 Orientalist Scholarship

Orientalist caste interpretations

European Orientalist scholars who studied ancient Indian texts also shaped perceptions of the caste system. Many Orientalists viewed the four *varna* system described in ancient texts as the authentic, original form of caste. They tended to equate this idealised four-fold division with the much more complex ground realities of numerous *jatis*. Scholars like Max Müller highlighted India's ancient spiritual traditions, contributing indirectly to perceptions of caste as rooted in Vedic traditions.. This view often overlooked the historical evolution and regional diversity of caste practices. This view may have contributed to perceptions of India as an unchanging society in contrast to Western dynamism.

1.1.1.5 Missionary Perspectives

Missionary views on caste

Christian missionaries who came to India had their own distinct perceptions of the caste system. While many missionaries criticised caste as a form of 'spiritual bondage', others adopted a pragmatic approach, choosing to accommodate certain caste practices in specific contexts to promote conversions. This led to debates within missionary circles about whether converts should be allowed to retain caste identities and practices.

1.1.1.6 Legacy of European Perceptions

Colonial legacy on caste

European perceptions of caste during the colonial era had a lasting impact on both scholarly and popular understandings of the system. Many of the categories and concepts developed by colonial scholars continued to shape how caste was studied and discussed in independent India. At the same time, nationalist Indian scholars in the late 19th and early 20th centuries began to challenge European interpretations of caste. They sought to develop indigenous frameworks for understanding Indian society and its institutions. The encounter between European and Indian perspectives on caste

set the stage for many of the debates and theories about caste that emerged in the 20th century. Understanding these early European perceptions provides important context for analysing later scholarly approaches to caste.

1.1.1.7 Early European Contact with India: Initial Contacts and Trade Relations

European contact built on longstanding trade networks established by Arab, Persian and Chinese merchants, who had extensive interactions with Indian society. The first major wave of European contact with India began with the Portuguese explorer Vasco da Gama's voyage in 1498, which established a direct sea route from Europe to India. This event initiated extensive interactions between European traders and Indian society, setting the stage for colonial enterprises The Portuguese pursued both economic gains and religious conversions, with missionary activities playing a central role in their colonial strategy. These early encounters were predominantly motivated by the pursuit of valuable commodities such as spices, textiles and precious metals. Portugal, followed by the Dutch, British and French, developed a series of coastal trading posts, establishing commercial relationships with local rulers and merchants.

▶ Portuguese exploration

The primary objective of these European powers was economic, with trade interests initially dominating over territorial control. The Portuguese were particularly successful in establishing a presence in Goa and other coastal areas of Western India, where they developed a colonial enclave that persisted until the 20th century. This period of early European contact saw diverse and dynamic interactions, including alliances with local rulers, conflicts and missionary activities. The Portuguese engaged with local rulers and utilised regional trade networks to establish a foothold in Goa and other coastal areas.

▶ Objectives of the European powers

The Dutch East India Company and the British East India Company, both founded in the 17th century, followed suit, establishing factories and trading posts along the Indian coast. Unlike the Portuguese, the Dutch and British focused more on commerce and less on proselytising. These European powers competed with one another for control over India's lucrative trade routes, frequently forming alliances with Indian rulers to strengthen their positions. The English, for instance, were able to negotiate favourable terms with Mughal rulers, leading to the establishment of factories and trading posts in places such as Surat, Madras and Calcutta.

▶ The Dutch and the British

European Accounts and Understanding of Indian Society

The early European travellers who visited India in the pre-colonial period were often struck by the richness and complexity of Indian society. Their observations were influenced by a combination of curiosity, misunderstanding and ethnocentrism. European travellers such as Marco Polo, whose accounts contained fantastical elements and Niccolò de' Conti, who focused more on trade and cultural practices, provided some of the earliest depictions of India. These accounts were heavily influenced by preconceived notions of the "exotic East."

▶ *Early European travellers*

Marco Polo, who visited India in the late 13th century, documented a thriving and diverse society with elabourate customs, which he found both fascinating and bewildering. His descriptions, which leaned heavily on second-hand accounts, highlighted the wealth of the region, its bustling markets and the diversity of religions and customs. However, like many other early European travellers, Marco Polo's accounts often conflated cultural practices with his own interpretations, leading to misunderstandings about the nature of Indian social organisation.

▶ *Marco Polo's account*

In the early 16th century, Duarte Barbosa, a Portuguese traveller, wrote extensively about the caste system and Indian society. His observations on the hereditary nature of occupations and strict social divisions provided a European perspective on the caste hierarchy. However, his understanding was limited, as he often interpreted the caste system through the lens of European feudalism, assuming that caste divisions were similar to the class structures of Europe. Barbosa's descriptions of caste reflected the early attempts by Europeans to categorise Indian society, often leading to oversimplifications and stereotypes.

▶ *Duarte Barbosa's description*

The accounts of Francois Bernier, a French traveller who visited India in the 17th century, further illustrate how Europeans attempted to interpret Indian society based on their own cultural frameworks. Bernier was one among the early European attempts to describe Indian social divisions in detail, equating the caste system with the rigid class hierarchies of Europe. He viewed the caste system as a form of "oriental despotism" and described the Indian social order as stagnant and oppressive. His writings significantly influenced subsequent European understanding of Indian society and contributed to the notion that India lacked historical dynamism.

▶ *Bernier's point of view*

Observations of Indian Social Hierarchies

The concept of caste was particularly perplexing to early European visitors, who attempted to interpret it in terms of European social structures. The caste system's emphasis on ritual purity and its complex hierarchical structure were often partially understood by Europeans, some of whom drew parallels with class divisions in Europe. However, unlike European class structures, which were largely based on wealth and economic power, caste was more intricately tied to ritual status, heredity and notions of purity and pollution.

Francois Bernier's observations of Indian society highlighted his struggle to comprehend the caste system. He viewed caste as a rigid and oppressive hierarchy that prevented social mobility, contrasting it with the supposedly more fluid class systems of Europe. Bernier's observations also reflected a Eurocentric perspective, a sense of cultural superiority, as he often criticised what he perceived as the "backwardness" of the Indian social system. His writings illustrate how early European perceptions of caste were shaped by a mixture of fascination, misunderstanding and disdain.

The caste system's insistence on occupational specialisation also contributed to the cultural shock experienced by European visitors. Many Europeans were struck by the degree to which caste dictated a person's occupation, social interactions and even dietary habits. These observations often led Europeans to view Indian society as static and unchanging, a perspective that would later influence colonial policies aimed at "modernising" and "civilising" India.

Role of Religion and Cultural Exchange

The pre-colonial interactions between Europeans and Indian society were not limited to trade and political alliances; they also involved significant cultural and religious exchanges. The Portuguese, in particular, were active in their attempts to convert Indians to Christianity and their missionary activities had a profound impact on the communities they engaged with. The Jesuits, who arrived in India in the 16th century, played a crucial role in the cultural exchange between Europe and India. St. Francis Xavier, one of the most prominent missionaries, worked extensively in Goa and South India, establishing schools and churches.

Jesuit missionaries like Roberto de Nobili adopted local customs and dressed like Indian ascetics in an effort to integrate themselves into Indian society and make Christianity more acceptable to the

local population. De Nobili's approach, which involved studying Sanskrit and Tamil and engaging with *Brahmin* scholars, led to a deeper understanding of Indian religious traditions. However, despite these efforts at cultural adaptation, the missionaries' primary goal was to convert the local population, which often resulted in conflict with local customs and resistance from the native population.

These religious encounters also led to the translation of Indian scriptures into European languages, providing Europeans with their first exposure to Hindu philosophy and religious thought. The Jesuits translated parts of texts such as the Vedas and the Upanishads into Latin, which later became foundational sources for European scholars interested in Indian culture and religion. These translations helped shape early European perceptions of Hinduism, though they often reflected the biases and limitations of the translators, who interpreted the texts through a Christian framework.

▶ *Translation works of Indian texts*

Economic Impact: Influence on Trade and Caste Relations

The arrival of European traders had a significant impact on local economies and, by extension, on caste relations. They often interacted with specific merchant and artisan castes, such as the weavers who produced the highly sought-after Indian textiles. These interactions influenced how Europeans perceived the caste system, as they often associated particular castes with specific economic functions. The focus on hereditary occupations, which was central to the caste system, seemed to align with the Europeans' experience of craft guilds back home, further reinforcing their perception of caste as a strictly occupational and inflexible hierarchy.

▶ *Impact on the local economies*

The economic activities of the European trading companies also altered traditional caste-based occupations. For instance, the British East India Company's monopoly over the textile trade led to changes in the livelihoods of weaving communities, disrupting local economies and forcing some castes to adapt to new forms of labour. In some cases, this led to a weakening of the traditional caste structure, as the economic basis for certain caste occupations eroded.

▶ *Influence on the traditional caste structure*

The land revenue systems introduced by the British, like Zamindari and Ryotwari systems, restricted land ownership and tenancy patterns, creating new economic hierarchies. The Europeans' preference for dealing with specific caste groups, such as merchants and moneylenders, also contributed to the consolidation of these castes' economic power.

▶ *Consolidation of economic power*

1.1.2 Racial and Occupational Theories

In the late 19th and early 20th centuries, scholars developed various theories to explain the origins and nature of the caste system. Two major strands of thought that emerged were racial theories and occupational theories of caste. These approaches reflected the intellectual currents of the time and had significant influence on both academic and popular understandings of caste. Some scholars opine that caste was not a closed form of stratification in its initial stages. Caste was an open system and occupations were open to all during the Vedic period. There were instances of intercaste marriages which were allowed. Caste became a rigid institution during the later Vedic period. *Purushasukta* hymn of *Rig Veda* attributes the origin of different *varnas* to the different parts of Lord Brahma, considered the progenitor deity. But many scholars reject such divine explanations and argue that such explanations were used to legitimise caste-based inequality. The 1931 census of India also made reference to seven caste origin theories. They are:

♦ The Divine Origin Theory

♦ *Karma* and Transmigration Theory

♦ Occupational Theory

♦ Tribes and Religious Theory

♦ Racial Theory

♦ Colour Theory

♦ Broken Men Theory

► *Caste origin theories*

In the historical point of view, Racial, Occupational and Broken Men Theories are more significant.

1.1.2.1 Racial Theories of Caste

Racial theories of caste gained prominence in the late 19th century, influenced by the rise of 'Scientific Racism' and 'Social Darwinism' in Europe. These theories posited that the caste system originated from racial differences between various groups that inhabited or invaded India in ancient times. One of the most influential proponents of the racial theory was Herbert Hope Risley, a British colonial administrator and ethnographer. In his work "The People of India" (1908), Risley argued that caste distinctions corresponded to racial types. He assertedthat the upper castes had "Aryan" features while lower castes had "Dravidian" or "aboriginal" features.

► *Racial caste theories*

Risley used anthropometric measurements like nasal index to categorise different caste groups into racial types. He saw the caste system as a means of preserving racial purity in the face of racial mixing. According to this view, the taboos against intermarriage between castes were mechanisms to prevent racial contamination. Other scholars like Gustav Oppert also developed racial theories of caste, linking caste hierarchy to supposed racial superiority and inferiority. These theories gained traction among both British and Indian elites, as they provided a seemingly scientific explanation for social inequalities.

Herbert Risley advocated Racial Theory in 1908. His well-known book "The People of India" made it clear that racial differences and endogamous marriages led to the origin of caste system. According to Risley, the caste system in this country developed after the emigration of Indo-Aryans from Persia. The important point is that in Persia, the society was divided into four classes such as Priests, Warriors, Cultivators and Artisans. Those who had come from Persia maintained this even after coming here. Their culture and race differed from the non-Aryans. For maintaining their superior status, they started practicing hypergamy and imposed restriction on pratiloma marriages.

Critique of Racial Theories

Racial theories of caste came under increasing criticism in the early 20th century. Anthropologists like Franz Boas challenged the scientific validity of racial categories and the link between physical features and social or cultural traits. In the Indian context, scholars pointed out that there was no clear correlation between physical type and caste status across regions. The diversity of physical features within caste groups also undermined simplistic racial explanations. Despite being discredited academically, racial understandings of caste continued to influence popular perceptions. Some anti-caste movements in South India, for instance, framed their struggle in terms of Dravidian vs. Aryan racial identity, highlighting political and socio-cultural distinctions rather than strictly racial differences.

1.1.2.2 Occupational Theories of Caste

Another major strand of thought viewed caste primarily as a system of occupational specialisation and division of labour. This perspective emphasised the economic functions of caste rather than racial or ritual aspects. Occupational theories traced the origins of caste to the increasing specialisation of labour in ancient Indian society. As different occupational groups became hereditary and endogamous over time, they developed into castes. Sociologist Célestin Bouglé's work "Essays on the Caste System" (1908)

Margin notes:

▶ *Anthropometric caste classifications*

▶ *Risley's racial caste theory*

▶ *Critiques of racial theories*

was influential in developing this approach. Bouglé argued that caste was fundamentally an economic institution that ensured the transmission of specialised skills and knowledge across generations. Some Marxist scholars also interpreted caste along occupational lines, seeing it as a pre-capitalist form of economic organisation. They viewed caste struggles primarily as class conflicts between different occupational groups.

Occupational Theory was propounded by Nesfield. According to him, occupation was the solefactor which contributed to the development of this system. He further pointed out that before this system, priesthood was not the exclusive monopoly of the Brahmins. However, later hymns and rituals became more complex. Therefore, a section of people got specialised in hymns and rituals and its members became the Brahmins. Similarly, other occupations were identified by different groups of men and over a period of time. This system too became rigid and hereditary.

Critiques of Occupational Theories

Critics of purely occupational theories pointed out that caste identities and hierarchies often persisted even when traditional occupations were abandoned. The ritual and social aspects of caste could not be reduced to economic functions alone. Additionally, occupational theories struggled to explain the existence of castes that did not have clear occupational specialisations, or the presence of the same occupations across different caste groups.

1.1.2.3 Colour Theory

The colour question in the caste formation has got popularity. It is apparent from the word *varna* which means colour. The section which retained purity of colour by avoiding intermixture became significant in the social scale. But Iravati Karve rejects this view. According to her, in the early literature and in grammatical works, *varna* meant class.

1.1.2.4 Broken Men Theory

Dr. B.R. Ambedkar was opposed to all the prevalent theories of caste. He believed that all such theories are ideological devices of Brahmanical class to maintain its superiority over other classes. Dr. B.R. Ambedkar provided an alternate view about the origin of caste in his 'Broken Men Theory'. He mentioned his theory in detail in his book "The Untouchables" (1948). According to him, a group of tribes were defeated and fragmented in wars and conquests in ancient times and they became wandering Broken Men.

Synthesis Attempts

Some scholars attempted to synthesise racial and occupational explanations of caste. For instance, sociologist G.S. Ghurye in his work "Caste and Race in India" (1932) argued that both racial and functional factors played a role in the development of the caste system. Ghurye suggested that initial racial differences may have contributed to the formation of endogamous groups, which then developed occupational specialisations over time. However, he emphasised that contemporary caste identities could not be explained by race alone.

Impact on Policy

Racial and occupational theories of caste had a significant impact on colonial policies and nationalist responses in the early 20th century. The British used these theories to justify their rule as bringing order to a society fragmented by caste divisions. At the same time, Indian reformers and nationalists drew on these theories in different ways. Some used arguments framed around race and ethnicity to challenge Brahminical supremacy, while others emphasised the economic aspects of caste to argue for modernisation and industrialisation. The debates sparked by racial and occupational theories contributed to the emergence of caste as a central issue in Indian politics and policymaking. These theories influenced the enumeration of caste in colonial censuses, which later informed debates on caste-based reservations.

1.1.3 European Philosophers and Social Theorists: Perspectives on Caste and Social Stratification

European intellectuals sought to understand the caste system through their own conceptual frameworks, often imposing Western ideas of class, hierarchy and historical progress onto this distinctly Indian phenomenon. Here are the contributions of major European philosophers and social theorists—such as G.W.F. Hegel, Karl Marx, Montesquieu and Rousseau—and their interpretations of the caste system in India.

1.1.3.1 G.W.F. Hegel: Philosophy of History and Caste

G.W.F. Hegel, a prominent figure of German Idealism, contributed significantly to the European perception of the caste system through his theory of historical progress. Hegel placed Indian society within his "Philosophy of History," situating it at an early stage of civilisational development. He argued that the

caste system created rigid social divisions that prevented political, economic and cultural progress.

In Hegel's view, India lacked historical dynamism, which he associated with the ability of societies to change and adapt through conflicts and resolutions. The caste system, with its rigid boundaries and predetermined roles, stood in contrast to the dynamic and progressive societies of Europe, where individuals had the freedom to pursue their interests and rise above their social origins. According to Hegel, the caste system resisted not only political despotism but also meaningful interactions between social and political spheres. Consequently, Hegel claimed that India remained in a "dreamlike state," a civilisation without true historical consciousness, reflecting his Eurocentric perspective.

▶ Lack of historical dynamism

Hegel's critique of caste was closely tied to his belief in the superiority of Western civilisation. He argued that India's social stagnation necessitated its colonisation, as European intervention would help bring it into the fold of world history. This Eurocentric view, while influential, reduced the complexity of the caste system to a simplistic opposition between tradition and modernity, ignoring its adaptive features and regional variations.

▶ Ignoring the adaptive features and regional variations

1.1.3.2 Karl Marx: Caste and the Asiatic Mode of Production

Karl Marx provided a materialist perspective on the caste system, describing it in the context of his theory of the "Asiatic mode of production." Marx argued that the caste system was a key feature of the economic structure in India, where village communities functioned as largely self-sufficient units. These communities were both social and economic units, with caste serving as a mechanism for maintaining the division of labour and preserving social order.

▶ Materialist perspective

Marx viewed caste as an impediment to social progress because it prevented the development of class consciousness. In his view, the rigid and hereditary nature of caste relations inhibited the formation of broader alliances among the labouring classes, thus preventing collective resistance to exploitation. The village community, which Marx called the "natural form of Indian society," was both a product of and a contributor to the despotic political structure that characterised pre-colonial India.

▶ An impediment to social progress

While Marx was critical of British colonial exploitation, he also believed that colonial intervention could be a catalyst for social change. By dismantling traditional structures like caste, British colonialism, despite its exploitative nature, could inadvertently pave the way for the development of capitalism and, eventually, a

▶ Colonial intervention as a catalyst for social change

socialist revolution. However, Marx's analysis has been critiqued for oversimplifying the complexities of caste by reducing it to an economic category, thus neglecting its cultural and religious dimensions.

1.1.3.3 Montesquieu: Caste and Despotic Governance

▶ *Montesquieu's analysis*

Montesquieu, a key figure of the Enlightenment, discussed caste in the context of his broader theories of governance. In "The Spirit of the Laws," Montesquieu argued that different forms of government required different social structures and he saw caste as particularly suited to despotic regimes. According to Montesquieu, the rigid social divisions imposed by the caste system helped maintain order in large empires like India, where despotism was the prevailing form of government.

▶ *An obstacle to liberty and progress*

Montesquieu's analysis reflected the Enlightenment fascination with categorising societies according to their forms of government and social organisation. He viewed caste as an obstacle to liberty and progress, reinforcing his belief in the superiority of European constitutional monarchies over the despotic states of Asia. While Montesquieu's understanding of caste was limited by his reliance on second hand accounts, his work contributed to the broader European discourse that portrayed Indian society as fundamentally static and despotic.

1.1.3.4 Jean-Jacques Rousseau: Inequality as a Social Construct

▶ *Critiqued social inequality*

Jean-Jacques Rousseau, another Enlightenment philosopher, critiqued social inequality in his work "Discourse on the Origin and Basis of Inequality Among Men." Rousseau argued that inequality was not a natural condition but rather a product of social institutions and human conventions. Although Rousseau did not directly address the caste system, his critique of social inequality can be applied to caste as a system that institutionalises hierarchy based on birth.

▶ *Emphasisis on the social inequality*

Rousseau's ideas, though not directly addressing caste, challenge the notion that hierarchical systems are natural or divinely ordained social order, instead framing it as a human construct designed to maintain power and privilege. His emphasis on the social origins of inequality provides a philosophical basis for critiquing caste and advocating for social reform. Rousseau's work influenced later social theorists, including Marx, in their analysis of social stratification and the need for transformative change

1.1.3.5 Louis Dumont and *Homo Hierarchicus*

Dumont's holistic approach

Louis Dumont's seminal work "Homo Hierarchicus: The Caste System and Its Implications" (1966) marked a major shift in the study of caste. Dumont, a French anthropologist, sought to understand caste as a holistic system with its own internal logic. His structuralist approach and emphasis on ideology had a profound impact on subsequent scholarship on caste. Dumont believed that the west's excessive individualism was the single greatest challenge to the understanding of caste. According to Dumont, caste is seen to express a commitment to social values that the modern world has lost. Dumont claimed Karl Marx and Durkheim as his sociological ancestors and he began his book "Homo Hierarchicus" with such a critique of individualism.

Dumont's Approach

Hierarchy vs. equality

Dumont approached the study of caste from a comparative perspective, contrasting Indian society with Western modernity. He argued that understanding caste required de-emphasising Western notions of equality and individuality to some extent. Instead, he proposed viewing Indian society through the lens of hierarchy and holism. For Dumont, caste was not merely a form of social stratification but a fundamental principle organising all aspects of Indian social life. He saw hierarchy, rather than equality, as the core value of traditional Indian civilisation.

The Principle of Hierarchy

Purity-pollution hierarchy

At the heart of Dumont's analysis was the concept of hierarchy based on the opposition between purity and pollution. He argued that this religious principle of ritual purity was the key to understanding the caste system. According to Dumont, castes were ranked based on their relative purity or pollution. Brahmins, as the ritually purest group, occupied the top of this hierarchy. The idea of untouchability represented the extreme pole of impurity. This hierarchical principle, Dumont claimed, permeated all social relations in traditional Indian society. Even apparently secular domains like political power were ultimately subordinated to the religious principle of purity.

Separation and Interdependence

Caste separation and interdependence

Dumont emphasised that the caste system involved both separation between castes and interdependence among them. Castes were endogamous groups with their own customs and rules. At the same time, they were linked through economic exchanges and ritual

relationships. The jajmani system, where different castes provided specialised services to each other, exemplified this interdependence for Dumont. He saw it as a way of integrating potentially conflicting groups into a coherent whole.

Caste vs. Class

▶ *Caste-class distinctions*

Dumont drew a sharp distinction between caste and class as forms of social stratification. While class was based on economic differences, caste in his view was fundamentally about ritual status. He argued that in traditional Indian society, even wealthy members of lower castes could not claim higher status. This contrasted with class-based societies where economic mobility could lead to social mobility. For Dumont, attempts to equate caste with class or to explain caste purely in economic terms missed its essential ideological nature.

Tradition vs. Modernity

▶ *Caste in modern India*

Dumont saw caste as the defining institution of traditional Indian civilisation, in contrast to the individualism and egalitarianism of modern Western society. He was skeptical of the idea that modernisation would automatically lead to the dissolution of caste. Instead, Dumont argued that elements of caste ideology continued to shape Indian engagement with modernity. He saw this as leading to unique forms of "modern caste" that adapted traditional principles to new contexts.

Influence and Criticisms

Dumont's work had a major impact on caste studies, shifting focus from empirical descriptions to structural analysis. His emphasis on understanding the cultural logic of caste from within challenged evolutionist assumptions about traditional societies. However, Dumont's theories also faced significant criticism:

1. Overemphasis on ideology: Critics argued that Dumont's focus on religious principles neglected the material realities of caste oppression and conflict.

▶ *Critiques of Dumont's theory*

2. Ahistorical approach: His portrayal of caste as a timeless system was seen as ignoring historical changes and regional variations.

3. Brahmanical bias: Some scholars claimed Dumont's reliance on textual sources led to an overly Brahman-centric view of caste.

4. Neglect of power: Dumont was criticised for downplaying the role of political and economic power in shaping caste relations.

5. Orientalist undertones: His sharp dichotomy between hierarchical India and egalitarian West was seen by some as reinforcing colonial stereotypes.

Reassessing Dumont

▶ *Dumont's lasting influence*

Despite these criticisms, Dumont's work continues to be a reference point in caste studies. Many scholars have built on or reacted against his ideas in developing new approaches to understanding caste. Some recent work has sought to reconcile Dumont's insights about caste ideology with more grounded studies of caste practices and politics. Others have used his comparative framework to analyse how caste principles interact with modern institutions. Dumont's emphasis on taking seriously the internal logic of non-Western social systems remains influential in anthropology beyond caste studies. His work raised important questions about cultural translation and the limits of applying Western concepts to other societies.

1.1.3.6 Andre Beteille

▶ *Beteille's caste approach*

Andre Beteille is a contemporary of Louis Dumont. They have used different approaches to caste system. Beteille started his analysis of caste from three different caste groups i.e. Brahmins, Adi-Dravidas and other non-Brahmins in a village called Sripuram in Tamil Nadu. He described his findings in 1962. His book "Caste, class and power: Changing Patterns of Stratification in Tanjore village" was published in 1965. His approach on study of caste is influenced by Marxist as well as Weberian points of view.

▶ *Caste, class and power*

Beteille adopted the Trinitarian approach of Weber but sometimes he deviates from it. He revealed that along with caste one should also study class and power as well. According to Beteille, new class structures have emerged from land holding patterns and also from new forms of economic occupations. According to him, one of the prime aspects of power is institutional and formal which is reflected in political struggle through political parties and panchayats. The traditional relationship between Caste and was altered significantly in some regions after independence.

In Sripuram Panchayat, Brahmins did not hold positions of electoral power. At the same time, Non-Brahmin castes dominated positions in local Panchayat. It is to be pointed out that in Sripuram,

Beteille found that it was not only Brahmins that maintained distance from other castes, but Adi-Dravidas (the depressed classes) also avoided mixing with Brahmins. The Adi-Dravidas considered that mixing with the Brahmins will attract misfortune to them.

Beteille is of view that contemporary interrelation among Caste, Class and Power was not as harmonious as before. It so happened because of growth of education, secularisation of society and occupations, migration, politics and democracy. In addition to these changes, caste dimension still survives. His opinion is that India has gone only for partial modernisation and complete modernisation is yet to come.

1.1.4 Social Exclusion and Social History

In recent decades, new approaches to studying caste have emerged that focus on the dynamics of social exclusion and the historical processes through which caste identities and practices have evolved. These perspectives seek to overcome some of the limitations of earlier theories by grounding the analysis of caste in concrete social, economic and political contexts.

European philosophers and social theorists, including Hegel, Marx, Montesquieu and Rousseau, approached the caste system through their frameworks, often using Western notions caste system. Hegel criticised caste for interrupting progress, while Marx viewed it as an economic hinderance to class consciousness. Montesquieu connected caste to despotic governance and Rousseau used it as a social construct that perpetuates inequality. Louis Dumont offered a structuralist analysis, focusing on hierarchical nature that caste offers and its religious basis. Andre Beteille analysed the interplay of caste, class and power and focused on changes in contemporary Indian society during partial modernisation and thus evolving new social relations.

1.1.4.1 The Concept of Social Exclusion

The framework of social exclusion, developed initially in European social policy contexts, has been increasingly applied to the study of caste in India. This approach focuses on the processes by which individuals or groups are systematically disadvantaged and denied full participation in society. In the context of caste, social exclusion refers to the ways in which lower caste groups, particularly Dalits (formerly known as "untouchables"), are marginalised and discriminated against in various spheres of life. This includes exclusion from economic opportunities, social interactions, political participation and access to public services.

Key aspects of caste-based social exclusion include:

1. Economic exclusion: Denial of access to certain occupations, land ownership and market opportunities.

2. Social exclusion: Restrictions on social interactions, marriage and participation in community events.

3. Spatial exclusion: Segregation in housing and limitations on physical mobility.

4. Cultural exclusion: Denial of access to education, religious spaces and cultural resources.

5. Political exclusion: Under-representation in political institutions and decision-making processes.

▶ *Types of caste exclusion*

▶ *Caste exclusion in Kerala*

Social exclusion on the basis of caste was a grave problem in the country as a whole and Kerala in particular until a few decades ago. Many of such social exclusions were so cruel and shameful. The dalits were the worst victims of all kinds of social exclusions. Untouchability and unapproachability were the base of this discrimination which was maintained for thousands of years in the country.

The lower caste people were not allowed to take drinking water from public wells. They had no right to use public roads and pathways. Both men and women of backward classes were denied proper dressing. They had no right to cover the upper part of their body. But those who had converted to Christianity could cover their upper part. Because of this grave social evil, there broke out the Channar Agitation for the attainment of right to cover upper part of the body of Nadar women. The Channar agitation attained its aim and their women got the right to properly cover their body. This historic fight came to be called as the Breast Cloth Agitation.

▶ *Channar Agitation*

▶ *Vivekananda's Kerala observation*

Social exclusion severely affected Kerala compared to the other parts of the country. While Swami Vivekananda came to Kerala, He had seen a number of boards in the railway stations inscribing Hindu Pani, Muslim Pani etc. It was after seeing such boards of social discriminations that the he used the term "Kerala is a lunatic asylum".

▶ *Denial of basic rights*

The backward classes were denied the right to use ornaments. Their children were not admitted to Schools. They had to fight a lot for the attainment of these rights.

1.1.4.2 Vaikom Satyagraha - 1924

The approach roads to the Vaikom Temple were placed with

theendalpalakas (prohibition of entry) and the roads were not allowed for backward classes. After several discussions and meetings the Vaikom Satyagraha was started under the leadership of T.K. Madhavan, K. Kelappan and many other leaders. Because of the able leadership and participation of many eminent personalities, the Vaikom Satyagraha attained all India attention.

Sree Narayana Guru visited Vaikom and blessed the participants and the Guru offered all kinds of help to Vaikom Satyagraha. Vaikom Satyagraha was participated by A.K.Gopalan and E.V. Ramaswamy Naicker (E.V.R.). was manhandled by the reactionaries and E.V.R. was arrested and imprisoned. Mahatma Gandhi also intervened in the matter.

As a compromise, the approach roads to Vaikom Temple except the east entrance road were opened to all. The *Theendalpalakas* were removed from there. Even though Vaikom Satyagraha was not a complete success it was indeed a glorious struggle. T.R. Ravindran wrote his classical work Vaikom Satyagraha and Gandhi which narrates the incident in the true sense.

1.1.4.3 Temple Entry Proclamation - 1936

A grave social evil existed in Kerala was denial of temple entry to low caste Hindus. For the attainment of their ambition they did a lot of things. The temple entry proclamation of Travancore in 1936 was really a progressive step introduced by Maharaja Sri Chithira Thirunal who was the last monarch of Travancore. According to this proclamation all Hindus were given the right to go to the temple of Travancore irrespective of their caste. This incident too attracted all India attention.

Social exclusion practically disappeared after independence. The erstwhile Travancore state had brought forward and passed a series of social legislations for the eradication of several social inequalities.

1.1.4.4 Social History Approach

The social history approach to caste emphasises understanding the historical processes through which caste identities and practices have been constructed, contested and transformed over time. This perspective challenges views of caste as a timeless or unchanging system.

Key aspects of the social history approach include:

1. Examining regional variations in caste practices and identities.

2. Studying how colonial policies and knowledge production shaped modern understandings of caste.

3. Analysing the role of social movements and political mobilisation in challenging caste hierarchies.

4. Investigating how economic changes have affected caste relations.

5. Exploring the intersection of caste with other forms of social identity like gender and religion.

The term "social history" refers to a sub-discipline of the historical sciences. It also has a general approach to history that focuses on society. Social history developed from tentative origins at the end of the nineteenth and the beginning of twentieth centuries. Social history experienced a great expansion from the 1950s to 1980s.

Social history is different from political history. The 'social' in social history refers to dealing with the structures of societies and social change. It is also dealt with social movements, groups and classes, families, local communities, mobility ethnic groups etc. It is significant to note that social history challenged dominant historical narratives which were constructed around the history of politics and the state. With several progressive objectives, social historians sought to uncover the relationships between economic, demographic and social processes and structures. It is also noteworthy that the term of 'history of society' against 'social history' assumed popularity recently.

1.1.4.5 Postwar Expansion (1950s -70)

In Western Europe and North America and also in other parts of the world, the establishment, expansion and specialisation of social history strengthened particularly during the postwar period. The institutional growth of social history can be seen in different nations. In 1970 a high point was reached in its establishment within the universities and among the public. The most impressive indicator was the founding of new journals around 1975. The journals were Social Science History (USA, 1975), Social History (UK -1976) etc. Similarly, the circle of Social History is widening year by year in several nations.

Summarised Overview

This unit examines various scholarly approaches to understanding the caste system in India. It begins by exploring how European colonisers and scholars perceived and theorised about caste during the colonial era. Early travellers and administrators often viewed caste through an Orientalist lens, seeing it as a unique and ancient feature of Indian civilisation. The British colonial census played a key role in enumerating and classifying caste groups, which some argue led to a more rigid understanding of caste identities.

Then the unit discusses the early European travellers who visited India in the pre-colonial period and their information about Indian society. And how the arrival of European traders influenced local economies and caste relations. The unit then examines racial and occupational theories of caste that emerged in the late 19th and early 20th centuries. Racial theories, influenced by scientific racism, posited that caste distinctions corresponded to racial types. Scholars like Herbert Risley used anthropometric measurements to categorise different caste groups. Occupational theories, in contrast, viewed caste primarily as a system of hereditary occupational specialisation. Both approaches have been critiqued for oversimplifying the complex realities of caste.

This unit provides detailed information about the contributions of major European philosophers and social theorists—such as G.W.F. Hegel, Karl Marx, Montesquieu and Rousseau—and their interpretations of the caste system in India. Louis Dumont's structuralist analysis of caste, presented in his influential work "Homo Hierarchicus," is then explored. Dumont argued that hierarchy based on the opposition between purity and pollution was the key principle underlying the caste system. His work shifted focus from empirical descriptions to understanding the cultural logic of caste. However, critics argue that Dumont's approach was overly idealistic and neglected the role of power and conflict in shaping caste relations.

The unit concludes by examining more recent approaches to caste through the lenses of social exclusion and social history. The social exclusion framework focuses on how lower caste groups, particularly Dalits, are systematically disadvantaged and denied full participation in society. This approach emphasises the multidimensional nature of caste discrimination, including economic, social and cultural aspects. The social history approach, on the other hand, emphasises understanding the historical processes through which caste identities and practices have been constructed, contested and transformed over time. These varied approaches highlight the complexity of caste as a social phenomenon and the ongoing debates about how best to conceptualise and study it. While earlier theories often portrayed caste as a timeless and unchanging system, more recent scholarship emphasises its dynamism and adaptability. Understanding these different perspectives is crucial for comprehending the persistence of caste in modern India and the challenges of addressing caste-based discrimination and inequality.

Assignments

1. Critically analyse the impact of colonial census operations on caste identities in India.

2. Compare and contrast racial and occupational theories of caste. What were the limitations of these approaches?

3. Evaluate Louis Dumont's concept of hierarchy in understanding the caste system. How have scholars critiqued his approach?

4. How does the social exclusion framework contribute to our understanding of caste-based discrimination in contemporary India?

5. Discuss the strengths and limitations of applying a social history approach to the study of caste.

6. Analyse the role of Orientalist scholarship in shaping European perceptions of the caste system.

Suggested Reading

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2. Heath, B., *The Impact of European Colonialism on the Indian Caste System.* E-International Relations, 2012, https://www.e-ir.info/2012/11/26/the-impact-of-european-colonialism-on-the-indian-caste-system/

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4. Oommen, "Race, Religion and Caste: Anthropological and Sociological Perspectives", *Comparative Sociology*, *1*(2), 115-126, 2002, https://doi.org/10.1163/156913302100418457

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.

UNIT 2

Caste in History

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

♦ trace the historical development of *varna* and *jati* in ancient India

♦ analyse D.D. Kosambi's Marxist interpretation of caste as class

♦ evaluate B.R. Ambedkar's concept of caste as a system of graded inequality

♦ assess Devaraj Chanana's analysis of caste slavery in ancient India

Background

In 2018, widespread protests erupted across India after the Supreme Court issued a ruling that was seen as diluting the 'Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act'. This legislation was designed to protect Dalits and other marginalised groups from caste-based discrimination and violence. The court's decision to introduce safeguards against potential misuse of the Act sparked outrage among Dalit activists and communities, who viewed it as weakening a crucial legal protection. The ensuing demonstrations, which turned violent in some areas, highlighted the ongoing salience of caste in modern India and the deep-rooted tensions surrounding issues of caste identity, discrimination and social justice. This incident serves as a potent reminder that caste remains a contentious and influential force in Indian society, even as the country continues to modernise and develop economically. Understanding the historical evolution and sociological foundations of the caste system is thus critical for making sense of contemporary Indian society and politics.

This unit will explore the historical development of caste in India, examining its origins in ancient times and tracing its evolution through different periods. We will analyse key theories and perspectives on caste put forth by prominent scholars, focusing on the works of D.D. Kosambi, B.R. Ambedkar and Devaraj Chanana. By the end of this unit, learners will have gained a nuanced understanding of caste as a complex and dynamic social institution that has profoundly shaped Indian civilisation over millennia.

Discussion

1.2.1 *Varna* and *Jati* Formation in Ancient India

▶ *Structure of Varna system*

The caste system as it exists in India today has its roots in ancient times, evolving out of earlier systems of social stratification. To understand how the caste system developed, it is necessary to examine the concepts of *varna* and *jati,* which form the foundation of caste hierarchy and identity. The *varna* system emerged in the later Vedic period (c. 1000-500 BCE) as a theoretical model of social organisation. It divided society into four broad hierarchical groups: Brahmins (priests and scholars), *Kshatriya*s (warriors and rulers), *Vaishyas* (merchants and traders) and Shudras (labourers and artisans). A fifth category of "outcastes" or "untouchables" eventually developed as well, though it was not part of the original four-fold *varna* scheme. This *varna* model was articulated in ancient texts like the Purusha Sukta hymn of the *Rig Veda*, which described the *varnas* as originating from different parts of the cosmic being Purusha's body - Brahmins from the mouth, *Kshatriya*s from the arms, *Vaishyas* from the thighs and Shudras from the feet.

▶ *Proliferation of jati*

While the *varna* system provided an idealised framework, the practical reality of caste took shape through the development of *jati*s - endogamous occupational groups that were more localised and specific than the broad *varna* categories. *Jati*s proliferated over time, with new groups forming as populations grew, occupations became more specialised and tribal or outsider groups were absorbed into the caste hierarchy. By the beginning of the Common Era, thousands of *jati*s existed across India, each with its own customs, rules and relative social status.

▶ *Varna -jati relationship*

The relationship between *varna* and *jati* was complex. In theory, each *jati* belonged to one of the four *varnas*, but in practice, the mapping was often ambiguous or contested. Many *jati*s claimed a *varna* status higher than what others accorded them. The *varna* model served as an overarching ideological framework that *jati*s

used to legitimise their position and assert claims to status, even as the ground reality was far more complex and fluid.

Several factors drove the formation and solidification of the *jati* system in ancient India:

1. Occupational specialisation: As the economy became more complex, hereditary occupational groups emerged to preserve specialised skills and knowledge.

2. Endogamy: The practice of marrying within one's group helped maintain occupational specialisation and reinforced group identity.

3. Ritual purity: Notions of ritual purity and pollution became associated with different occupations and groups, creating a hierarchical ranking.

4. Migration and assimilation: As new groups entered settled agricultural society, they were often incorporated as distinct *jati*s.

5. Political factors: Rulers sometimes granted special privileges or status to certain groups, solidifying *jati* divisions.

6. Economic changes: Shifts in production methods and economic organisation impacted the status and role of different occupational groups.

▶ *Formation and solidification of the jati system*

The interplay of these factors led to the emergence of a complex social system with thousands of *jati*s arranged in a flexible hierarchy. This system was not static but evolved over time in response to economic, political and social changes. It's important to note that the development of the caste system was not uniform across India. There were significant regional variations in how caste hierarchies were structured and the degree to which they were rigidly enforced. In some areas, particularly in South India, the *varna* model was less prominent and local caste systems developed with their own unique features.

▶ *Flexible hierarchy*

The Gupta period (c. 320-550 CE) is often seen as a crucial time in the consolidation of the caste system. During this era, legal codes like the Laws of Manu provided detailed prescriptions for caste duties and behavior, attempting to create a more standardised system. However, these texts likely reflected idealised Brahminical views rather than on-the-ground social realities across all of India.

▶ *Caste system during Gupta period*

By the medieval period, the basic contours of the caste system as we know it today were in place across much of the subcontinent. Thousands of *jati*s existed, loosely grouped under the four *varnas*,

with complex rules governing intermarriage, commensality, occupation and ritual status. This system proved remarkably resilient, adapting to changing political and economic conditions while maintaining its core features of hereditary membership, endogamy and hierarchical ranking.

1.2.1.1 *Varna-Jati* Evolution

The development of *varna* and *jati* in ancient India demonstrates how abstract social ideals can interact with practical realities to produce complex and enduring social institutions. The *varna* model provided an ideological framework that could accommodate the proliferation of *jati*s while maintaining an overarching hierarchy. At the same time, the *jati* system allowed for a degree of flexibility and local variation within the broader *varna* structure. This combination of rigidity and adaptability helps explain the longevity and pervasiveness of caste in Indian civilisation.

Understanding the historical roots of caste is crucial for analysing its role in contemporary India. While much has changed, many of the core principles established in ancient times - such as hereditary membership, endogamy and notions of purity and pollution - continue to shape social relations and identities today. The tension between the idealised *varna* model and the complex reality of *jati*s also remains relevant, as groups continue to contest their position within the caste hierarchy and debate the meaning and relevance of caste in modern society.

1.2.2 D.D. Kosambi - Caste as Class

D.D. Kosambi (1907-1966) was a pioneering Indian historian who brought a Marxist perspective to the study of ancient Indian history and society. His work on caste was groundbreaking in its attempt to analyse the system through the lens of historical materialism, viewing caste divisions as fundamentally rooted in economic relations rather than purely religious or ideological factors. Kosambi's core argument was that caste functioned as a system of class relations in Indian society, albeit one that was uniquely shaped by India's specific historical development. He saw the caste system as emerging from the interaction between incoming Aryan tribes and indigenous populations in ancient India, with the initial division of labour gradually calcifying into hereditary occupational groups.

In Kosambi's view, the four-fold *varna* system represented broad class divisions in early Indian society:

1. Brahmins: The priestly class who monopolised religious and intellectual functions

2. *Kshatriya*s: The warrior and ruling class

3. *Vaishyas*: The class of merchants, traders and property owners

4. Shudras: The labouring classes, including peasants and artisans

The first three *varnas* were considered as *dvija*/ twice- born, ie., ritually purer than the Avarna.

▶ *Division of varnas*

Kosambi argued that this system arose as a means of organising production and maintaining social control in ancient agricultural societies. The religious justifications for caste, including concepts of *karma* and *dharma*, were seen by Kosambi as ideological superstructures that served to legitimise and reinforce the underlying economic relationships.

▶ *Evolving system*

Kosambi emphasised that caste was not a static system but evolved in response to changing material conditions. He traced how the proliferation of *jati*s reflected increasing occupational specialisation and the incorporation of new groups into the agrarian economy. He also analysed how caste relations were impacted by major economic and political shifts, such as the rise of Buddhism, the development of feudalism and the impact of foreign invasions.One of Kosambi's key insights was his analysis of how caste functioned to maintain stability in Indian society despite significant economic inequalities. He argued that the caste system's rigid hierarchies and religious justifications helped prevent the formation of broader class consciousness among exploited groups. By dividing the labouring classes into numerous endogamous *jati*s with their own specific customs and identities, the caste system inhibited unified resistance against the ruling classes.

▶ *Relationship between other forms of social organisation*

Kosambi also examined how caste interacted with other forms of social organisation in Indian history. He explored the tension between caste and tribal societies, analysing how tribal groups were gradually absorbed into the caste system as they were incorporated into settled agricultural economies. He also studied the relationship between caste and guild organisations in urban centers, showing how occupational associations could sometimes transcend caste boundaries.While acknowledging the importance of ritual status and notions of purity in the caste system, Kosambi insisted that these cultural factors were ultimately grounded in material realities. He argued that concepts of ritual purity often aligned with economic power, with groups that controlled important resources or performed vital economic functions generally accorded higher ritual status.

- *Challenging colonial and nationalist interpretations*

- *Kosambi's materialist analysis*

- *Importance of studying caste in relation to historical processes*

- *Critique*

- *Decolonisation and transformation of European perspectives*

Kosambi's work challenged both colonial and nationalist interpretations of Indian history. He critiqued orientalist views that saw caste as an unchanging, purely religious institution unique to India. At the same time, he was critical of nationalist historians who downplayed the oppressive aspects of caste or presented an overly idealised vision of ancient Indian society.

Kosambi's materialist analysis of caste opened up new avenues for understanding the system's historical development and social functions. By rooting caste in economic relations and class structures, he provided a framework for analysing how the system adapted to changing material conditions while maintaining its core features. His work continues to influence scholars seeking to understand the complex interplay between economic, social and ideological factors in the persistence of caste in modern India.

Kosambi's approach also highlights the importance of studying caste in relation to broader historical processes. Rather than treating it as an isolated cultural phenomenon, he showed how caste was intimately connected to patterns of production, political organisation and social control in Indian civilisation. This perspective encourages a more holistic understanding of caste's role in shaping Indian society over time.

While Kosambi's Marxist framework has been critiqued and refined by subsequent scholars, his insistence on grounding the study of caste in material realities and historical specificity remains valuable. His work reminds us of the need to look beyond purely ideological or cultural explanations to understand the enduring power of caste in Indian society.

1.2.2.1 European Intellectual Engagement with Indian Social Reformers

The decolonisation period significantly transformed European perspectives on the caste system in India, marking a departure from colonial-era misconceptions to a more nuanced understanding. Initially, colonial narratives often exoticised and demonised caste, portraying it as a static and oppressive social order. Edward Said's Orientalism (1978) was pivotal in challenging these views, revealing how Western knowledge about the "Orient," including caste, served colonial interests. He argued that these representations, depicting India as backward and irrational, were ideologically constructed rather than objective truths.

The influence of existentialist philosophers like Jean-Paul Sartre introduced a focus on individual freedom. Sartre posited that caste systems denied individuals their existential agency,

A focus on individual freedom

Influence of structuralism

Emphasis of contemporary philosphy

A powerful critique of the caste system

Ambedkar's understanding of caste

Concept of graded inequality

leading to a denial of one's potential for self-definition. Similarly, Frantz Fanon's exploration of colonialism's psychological effects resonated with the experiences of oppressed castes, illuminating the internalised inferiority faced by Dalits.

Structuralism, represented by Claude Lévi-Strauss and Louis Dumont, further evolved the discourse on caste. Dumont's Homo Hierarchicus framed caste as an internally coherent system based on principles of purity and hierarchy, although it faced criticism for overlooking economic factors of caste-based oppression. Marxist perspectives also gained traction, particularly Antonio Gramsci's notion of cultural hegemony, which reinterpreted caste as a system where dominant ideologies maintained control over marginalised groups.

In contemporary philosophy, thinkers like Jürgen Habermas emphasised inclusive dialogue and rational discourse, critiquing the exclusion of marginalised castes from public spheres. Simultaneously, engagement with Indian social reformers, particularly Dr. B.R. Ambedkar, enriched European understandings of caste as a systemic issue linked to social justice and human rights. Overall, decolonisation reshaped European views on caste, fostering a critical examination of power dynamics, cultural hegemony and the intersectionality of caste with broader social and economic inequalities.

1.2.3 B.R. Ambedkar - Caste and Graded Inequality

B.R. Ambedkar (1891-1956) was one of the most influential thinkers and social reformers in modern Indian history. As a scholar, politician and leader of the Dalit movement, Ambedkar developed a powerful critique of the caste system and articulated a vision for its annihilation. His analysis of caste as a system of "graded inequality" provides crucial insights into the persistence and pervasiveness of caste discrimination in Indian society.

Ambedkar's understanding of caste was shaped by his own experiences as an "untouchable" (Dalit) and his extensive study of Indian history, sociology and religious texts. Unlike some of his contemporaries who viewed caste as a corrupted form of an originally benign system, Ambedkar argued that inequality and oppression were fundamental to the very logic of caste.

The concept of "graded inequality" is central to Ambedkar's analysis of caste. He observed that the caste system did not simply divide society into a dominant group and a subordinate group. Instead, it created a complex hierarchy with multiple levels, where

each group had others both above and below it in status. This graded structure, Ambedkar argued, was key to the system's stability and persistence.

Ambedkar identified several key features of this system of graded inequality:

1. Hierarchical division: Society is divided into numerous castes arranged in a strict hierarchy.

2. Endogamy: Each caste group practices endogamy (marriage within the group), maintaining clear boundaries between castes.

▶ *Features of the system*

3. Hereditary occupations: Occupations are typically inherited, with certain jobs associated with specific castes.

4. Ritual purity and pollution: A system of ritual purity and pollution underlies the hierarchy, with higher castes considered more "pure" and lower castes more "polluting."

5. Social and economic rights: Rights and privileges are distributed unequally based on caste status.

▶ *'Creation of divided interests'*

The genius of this system, according to Ambedkar, was that it created divided interests even among the oppressed. While all lower castes faced discrimination from those above them, they could in turn discriminate against those below. This made it difficult for the oppressed to unite against the system as a whole. As Ambedkar put it, "Graded inequality prevents the rise of general discontent against inequality."

▶ *Maintained through ideological means*

Ambedkar argued that this system of graded inequality was maintained through both ideological and material means. On the ideological level, Hindu religious texts and philosophies provided justifications for caste hierarchy, including concepts of *karma* and *dharma* that explained one's caste position as the result of actions in past lives. These beliefs were internalised by people across the caste spectrum, leading even the most oppressed to accept their low status as natural or divinely ordained.

▶ *Maintained through Material level*

On the material level, the caste system was upheld through economic exploitation, social segregation and the monopolisation of education and religious authority by upper castes. Ambedkar emphasised how caste-based division of labour ensured that certain groups remained trapped in poverty and subservience, while others maintained their privileged positions.

Thus, Ambedkar's analysis went beyond simply describing the mechanics of caste oppression. He sought to understand why the caste system had proven so durable over time. One key insight was his recognition of how caste identity could provide a sense of superiority even to those who were materially deprived. As he noted, "A caste has no feeling that it is affiliated to other castes except when there is a Hindu-Muslim riot." This fragmentation of identity and interests made it difficult to build broad-based movements against caste oppression. Ambedkar argued that simply reforming the existing system or appealing to upper caste conscience would not be sufficient to eradicate caste inequality. Instead, he called for the "annihilation of caste" through radical social, economic and political transformation.

Annihilation of caste

Ambedkar's vision for overcoming caste inequality included:

1. Legal and constitutional safeguards against discrimination

2. Affirmative action policies to promote education and employment for marginalised groups

3. Land reforms to break the economic power of upper caste landowners

Overcoming caste inequality

4. Promotion of inter-caste marriage and social mixing

5. Rejection of Hindu religious texts and practices that sanctioned caste hierarchy

Crucially, Ambedkar saw the struggle against caste as interconnected with other forms of social and economic justice. He argued that political democracy would be meaningless without social and economic democracy and that the annihilation of caste was necessary for building a truly egalitarian society. Ambedkar's concept of graded inequality provides a powerful framework for understanding the complexity and resilience of caste discrimination in India. By highlighting how the caste system creates divided interests even among oppressed groups, he helps explain why caste hierarchies have persisted despite legal prohibitions and changing economic conditions. His analysis also underscores the need for multifaceted approaches to combating caste discrimination, addressing both its ideological and material foundations.

Caste struggle interconnected with other forms of justice

1.2.4 Devaraj Chanana - Caste Slavery

Slavery in Ancient India

Devaraj Chanana's work "Slavery in Ancient India" (1960) provides a valuable perspective on the relationship between caste and forms of unfree labour in ancient Indian society. While slavery in the classical sense was not as prevalent in India as in some other

ancient civilisations, Chanana argues that certain aspects of the caste system, particularly the treatment of the lowest castes and "untouchables," bore strong similarities to institutionalised slavery.

Sources used

Chanana's analysis draws on a wide range of textual sources, including Vedic literature, Buddhist texts and ancient legal codes like the Laws of Manu. He traces the development of various forms of servitude and unfree labour from the early Vedic period through the classical and early medieval eras of Indian history.

One of Chanana's key arguments is that the rigid hierarchies and hereditary occupations enforced by the caste system created conditions of de facto slavery for many lower caste groups. He points to several features of the caste system that parallel aspects of slavery in other societies:

1. Hereditary status: Like slaves in many societies, individuals born into lower castes inherited their subordinate status and had little opportunity for social mobility.

2. Restricted freedom of movement: Lower castes, especially "untouchables," often faced severe restrictions on where they could live, travel and work.

Parallel to slavery

3. Economic exploitation: Many lower caste groups were compelled to perform menial or degrading labour for upper castes with little or no compensation.

4. Lack of legal rights: Lower castes had few legal protections and limited access to justice under traditional Hindu law.

5. Social stigma: Like slaves, lower castes were considered inherently inferior and "polluting" to higher castes.

6. Limited control over family life: Chanana argues that restrictions on marriage and family formation for lower castes paralleled limitations placed on slaves in other societies.

Chanana examines how these slave-like conditions were justified and maintained through religious and philosophical doctrines. He analyses how concepts like *karma* and *dharma* were used to explain and legitimise the subordinate status of lower castes as the natural result of actions in past lives. This ideological framework helped to naturalise extreme inequality and exploitation within Indian society.

Justification of slave like conditions

While acknowledging differences between caste oppression and chattel slavery, Chanana argues that the experience of the lowest castes in India was in many ways comparable to - and in some

cases even worse than - that of slaves in other ancient societies. He points out that while slaves in some cultures could potentially be freed or see their children gain free status, the hereditary nature of caste meant that lower caste individuals and their descendants remained permanently trapped in their subordinate position.

Chanana traces how different forms of servitude and unfree labour evolved in ancient India:

1. *Dasa*: In early Vedic texts, the term '*dasa*' referred to conquered indigenous peoples who were often enslaved by Aryan invaders. Over time, it came to signify servants or slaves more generally.

2. *Shudra*: The lowest of the four *varnas* in classical Hindu society, *Shudras* were often compelled to serve the upper three *varnas* in menial capacities.

3. Untouchables: Groups considered outside the *varna* system altogether faced the most extreme forms of exploitation and social exclusion.

4. Debt bondage: Chanana examines how indebtedness could lead to hereditary servitude for lower caste individuals.

5. Criminal tribes: Certain groups branded as inherently criminal by colonial authorities faced conditions akin to slavery.

Chanana's work also explores how Buddhist and Jain teachings challenged some aspects of caste-based servitude, even as these religions ultimately failed to eliminate the caste system. He examines debates within ancient Indian philosophy and law regarding the status and treatment of servants and slaves.While focused primarily on ancient India, Chanana's analysis has implications for understanding the persistence of caste-based exploitation and discrimination in modern times. He argues that the deep-rooted association between caste status and forms of unfree labour has shaped economic and social relations in India over millennia, creating patterns of inequality that remain difficult to eradicate.

1.2.4.1 Synthesis and Critical Analysis

Having examined the perspectives of Kosambi, Ambedkar and Chanana on caste in Indian history, we can now synthesise their insights and critically analyse the strengths and limitations of their approaches. While each scholar brings a unique lens to

▶ Kosambi's materialist analysis

the study of caste, there are also important areas of overlap and complementarity in their work. Kosambi's materialist analysis provides a crucial foundation for understanding the economic basis of caste relations. By framing caste as a system of class relations shaped by India's specific historical development, he offers a framework for analysing how caste has evolved in response to changing modes of production and economic organisation. This approach helps explain the persistence of caste even as India has undergone significant economic transformations in the modern era.

▶ Ambedkar's concept of graded inequality

Ambedkar's concept of graded inequality complements Kosambi's class-based analysis by illuminating the complex psychological and social dynamics that have helped maintain caste hierarchies. His insight into how the caste system creates divided interests even among oppressed groups helps explain why broad-based resistance to caste has often been difficult to mobilise. Ambedkar's work also highlights the importance of addressing both the ideological and material foundations of caste oppression.

▶ Chanana's argument

Chanana's framing of aspects of the caste system as a form of slavery draws attention to the extreme forms of exploitation and unfreedom experienced by lower caste groups throughout Indian history. His analysis underscores the severity of caste oppression and challenges attempts to minimise or justify caste-based discrimination. By tracing the evolution of different forms of servitude in ancient India, Chanana also provides valuable historical context for understanding modern forms of caste-based labour exploitation.

Together, these scholars offer a multifaceted view of caste as:

1. A system of economic relations and class divisions (Kosambi)

2. A hierarchical social structure that creates graded inequalities (Ambedkar)

3. An institution that has imposed slave-like conditions on certain groups (Chanana)

▶ Integrated perspective

This integrated perspective helps explain the remarkable durability and adaptability of caste over time. It shows how caste has functioned simultaneously as an economic system, a social hierarchy and a form of cultural identity - with each aspect reinforcing the others.

However, it's also important to recognise the limitations and potential biases in these scholars' approaches:

▶ Limitations and potential biases

1. Kosambi's Marxist framework, while illuminating, may sometimes oversimplify the complex cultural and religious dimensions of caste.

2. Ambedkar's personal experiences as a Dalit, while providing crucial insights, may have led him to emphasise certain aspects of caste oppression over others.

3. Chanana's comparison of caste to slavery, while provocative, risks flattening important distinctions between these two forms of oppression.

▶ Foundational for understanding caste

Furthermore, all three scholars were writing in the mid-20th century and their work does not fully account for how caste has evolved in response to India's economic liberalisation and changing social dynamics in recent decades. Despite these limitations, the work of Kosambi, Ambedkar and Chanana remains foundational for understanding caste in Indian history. Their insights continue to inform contemporary debates about caste, inequality and social justice in India.

Some key themes that emerge from synthesising their perspectives include:

1. The interplay between economic, social and ideological factors in shaping caste relations

2. The adaptability of caste in response to changing historical conditions

▶ Key themes

3. The deep-rooted nature of caste oppression and the challenges of eradicating it

4. The need for multifaceted approaches to addressing caste inequality, tackling both its material and cultural dimensions

▶ Synthesis of different scholarly perspectives

This synthesis of different scholarly perspectives on caste highlights the complexity and multi-dimensionality of the phenomenon. It underscores the need for nuanced, historically grounded analyses that can account for both the enduring features of caste and its capacity for change and adaptation over time. Understanding caste through these varied lenses also has important implications for contemporary efforts to address caste-based discrimination and inequality in India. It suggests that effective interventions will need to address not only legal and policy issues, but also deeply ingrained social attitudes, economic structures and cultural practices that continue to reinforce caste hierarchies.

1.2.4.2 Contemporary Relevance and Debates

Role of caste in contemporary Indian society

While the work of Kosambi, Ambedkar and Chanana focuses primarily on the historical development of caste, their insights continue to shape debates about the role of caste in contemporary Indian society. As India has undergone rapid economic and social changes in recent decades, questions about the persistence, transformation and potential erosion of caste have become increasingly complex and contested.

Some key areas of ongoing debate and research include:

Caste and economic liberalisation

♦ Some scholars argue that market-driven economic reforms since the 1990s have weakened traditional caste hierarchies by creating new avenues for social mobility. Others contend that economic liberalisation has exacerbated caste inequalities by disproportionately benefiting already privileged groups. For example, the rise of the IT and services sectors in urban centers has provided opportunities for upward mobility to historically marginalised groups. But there are also instances when economic reforms have often favoured those from higher castes.

Caste in urban India

♦ While caste identities and practices remain strong in rural areas, their role in urban settings is more ambiguous. Some research suggests that caste becomes less salient in cities, while other studies show how caste networks and identities are reconfigured in urban contexts. For example, individuals from traditionally privileged castes may have easier access to job opportunities in certain fields.

Caste and politics

♦ The rise of caste-based political parties and the implementation of caste-based reservations (affirmative action) have transformed how caste operates in the political sphere. Debates continue over the effectiveness and unintended consequences of these policies.

Caste and gender

♦ Intersectional analyses have highlighted how caste and gender oppression interact, with Dalit women often facing multiple layers of discrimination. This has led to more nuanced understandings of how caste operates differently across genders. A Dalit woman working as a agricultural labourer may receive lower wages and face exploitative working conditions compared to her higher-caste counterparts. Also, she may face harassment or violence from upper-caste landowners, who view her as both lower in caste and gender hierarchies. She may also have to face

physical and mental abuses from men in her own caste. These multi level oppression limits her access to education, healthcare and economic opportunities and force her to live under poverty and marginalisation.

▶ *Caste in the diaspora*

♦ Studies of Indian diasporic communities have shown how caste identities and practices are maintained, transformed, or challenged in new cultural contexts. Indian immigrants settled abroad, continue to follow traditional caste distinctions through community organisations, marriages and social gatherings.

▶ *Caste and capitalism*

♦ Building on Kosambi's work, scholars continue to examine how caste relations have been reshaped by capitalist development in India and how caste networks sometimes facilitate business and economic activities.

▶ *Caste and education*

♦ While access to education has expanded significantly, research shows persistent caste disparities in educational outcomes and experiences. Debates continue over how to address these inequalities.

▶ *Caste discrimination in modern sectors*

♦ Studies have documented ongoing caste-based discrimination in urban, corporate and professional settings, challenging notions that modernisation automatically erodes caste distinctions.

▶ *Caste and religious conversion*

♦ Following Ambedkar's example of converting to Buddhism, debates continue over whether religious conversion offers an effective path for escaping caste oppression.

▶ *Legal and policy approaches*

♦ Ongoing discussions about the effectiveness of anti-discrimination laws, reservation policies and other legal measures in addressing caste inequality.

▶ *Evolving nature of caste in modern India*
▶ *Importance to emphasis the caste experience and negotiations*

These debates reflect the complex and evolving nature of caste in modern India. While legal prohibitions on caste discrimination and affirmative action policies have created new opportunities for marginalised groups, caste continues to shape social interactions, economic opportunities and political alignments in both overt and subtle ways. Recent sociological and anthropological research has also highlighted the need for more nuanced understandings of how caste operates in different regional and local contexts. This work challenges overly simplistic national-level narratives about caste and emphasises the importance of grounded, empirical studies of how caste is experienced and negotiated in everyday life.

At the same time, activist movements continue to draw inspiration from figures like Ambedkar in their struggles against caste oppression. Dalit rights organisations, for example, have used Ambedkar's writings to articulate demands for social justice and challenge ongoing forms of caste-based discrimination and violence. In the realm of scholarship, there has been growing interest in recovering and centering Dalit and other marginalised perspectives in the study of caste. This has led to important critiques of how upper-caste dominance in academia has shaped historical narratives and theoretical frameworks for understanding caste.

▶ *Focus on Dalit and marginalised perspectives*

Summarised Overview

This unit explores the historical development of caste in India and examines key theories put forth by prominent scholars. It begins by tracing the origins of the *varna* and *jati* systems in ancient India. The *varna* system, which divided society into four broad hierarchical categories, emerged in the later Vedic period. Over time, this evolved into the more complex *jati* system of numerous endogamous groups associated with specific occupations. The unit examines how factors like occupational specialisation, endogamy, notions of ritual purity and political dynamics contributed to the solidification of the caste system.

The Marxist historian D.D. Kosambi's interpretation of caste is then analysed. Kosambi viewed caste as fundamentally a system of class relations shaped by India's specific historical development. He argued that the *varna* system represented broad class divisions in early Indian society and that caste functioned to maintain social stability despite significant economic inequalities. Kosambi's work opened up new avenues for understanding how caste adapted to changing material conditions while maintaining its core features.

B.R. Ambedkar's analysis of caste as a system of "graded inequality" is a central focus of the unit. Ambedkar argued that the genius of the caste system lay in creating a complex hierarchy with multiple levels, where each group had others both above and below it in status. This graded structure, he contended, made it difficult for the oppressed to unite against the system as a whole. Ambedkar's work highlighted how caste was maintained through both ideological and material means and emphasied the need for radical social transformation to eradicate caste inequality.

The unit also examines Devaraj Chanana's work on "caste slavery" in ancient India. Chanana argued that certain aspects of the caste system, particularly the treatment of the lowest castes and "untouchables," bore strong similarities to institutionalised slavery. He analysed how religious and philosophical doctrines were used to justify and maintain the subordinate status of lower castes. Chanana's work highlights the extreme forms of

exploitation and 'unfreedom' experienced by lower caste groups throughout Indian history.

The unit concludes by synthesising these different perspectives and critically analysing their strengths and limitations. It explores how these scholars' insights continue to shape contemporary debates about caste in India. The persistence of caste-based discrimination and inequality in modern India is examined, as well as ongoing struggles against the caste system. This historical perspective provides crucial context for understanding the complex ways in which caste continues to shape Indian society, politics and culture in the 21st century. This unit explores the European attitudes towards caste necessitates and exploring how caste identities are maintained, contested and addressed legally within the caste communities.

Assignments

1. Analyse the factors that contributed to the development and solidification of the caste system in ancient India.

2. Critically evaluate D.D. Kosambi's Marxist interpretation of caste. How does his approach contribute to our understanding of caste in Indian history?

3. Discuss B.R. Ambedkar's concept of "graded inequality" in the caste system. How does this idea help explain the persistence of caste hierarchy?

4. Assess Devaraj Chanana's analysis of "caste slavery" in ancient India. To what extent is the comparison between caste and slavery valid?

5. Compare and contrast the approaches of Kosambi, Ambedkar and Chanana to understanding caste in Indian history. What are the strengths and limitations of each perspective?

6. Analyse the role of religious and philosophical doctrines in justifying and maintaining caste hierarchy throughout Indian history.

Suggested Reading

1. Dwarakanath Gupta, C., *Socio-Cultural History of an Indian Caste*, Mittal Publishers, 1999.

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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.

Caste and Hierarchy

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

♦ analyse the intersections between caste hierarchy and gender relations in India

♦ evaluate the historical and contemporary links between caste and occupational hierarchy

♦ examine the practice of untouchability and its role in social exclusion

♦ assess the influence of Brahmanical ideology and *Dharma Sastras* on social exclusion

Background

On January 2, 2024, a 9-year-old Dalit boy was beaten to death in Rajasthan's Jalore district for allegedly drinking water from a pot meant for upper caste teachers. This shocking incident highlights how caste discrimination and the practice of untouchability continue to persist in Indian society even today, despite being outlawed. It brings into sharp focus the deep-rooted nature of caste hierarchy and social exclusion faced by Dalits and other marginalised groups. The caste system has been a defining feature of Indian society for centuries, dividing people into hierarchical groups based on birth. At its core, it is a system of graded inequality, with Brahmins at the top of the hierarchy and Dalits or "untouchables" at the bottom. While the caste system originated in ancient Hindu texts and traditions, it has permeated most religious communities in India over time. This unit will examine various aspects of caste and hierarchy in Indian society - from gender relations and occupational divisions to untouchability and social exclusion. We will analyse how caste intersects with other forms of social stratification and explore the ideological underpinnings of the caste system. The unit aims to provide a comprehensive understanding of how caste continues to shape social relations, economic opportunities and political power in contemporary India.

Caste is indeed the prototype of social hierarchy. At the same time, hierarchy grasps only one dimension, even though it is a central one of the caste system. Hierarchy denotes a ranked order of people or values. In the broad sense, hierarchy has been applied to relations of dominion, rule of authority. Its other end is subordination. As per social order reference, hierarchy refers to status differences or to classifications of whole categories of people. Hierarchy is originally a western term derived from ancient Greek. The term hierarchy can be seen in the books of authors like Henri de Saint Simon, Auguste Comte and Hegel. Hegel was the first scholar to contrast the hierarchy of the socio-political order with a social condition based on human activity.

For a proper understanding of caste, one can observe two ways of approaching hierarchy. The first way means approaches focusing on ground realities which attempt to set out various forms of subordination. The second one starts from the idea of a social model and tends to look for structuring principles underlying the hierarchical order. Social actors may refer to the images of an ideal order like *savarna-avarna*, Brahmanical-non Brahmanical, polluting-non-polluting or by employing the Chatur*varna* model originally laid out in the *Rig Veda* and afterwards in the *Dharma Sastras*. Louis Dumont in his book on hierarchical India, *Homo Hierarchicus*, makes use of hierarchy of pure and impure.

Keywords

Brahmanical Patriarchy, Occupational Segregation, Untouchability, Social Exclusion, Purity-pollution, *Varnashrama Dharma*, Endogamy, *Dharma Sastras*

Discussion

1.3.1 Gender Relations and Brahmanical Patriarchy

▶ *Gender hierarchy women subordination and perpetuation of caste distinction*

The caste system and gender hierarchy in India are intricately linked through what scholars call "Brahmanical patriarchy". This refers to the structure of social relations and ideology in which caste hierarchy and gender asymmetry are mutually dependent. The concept of 'Brahmanical patriarchy' was first articulated by feminist historian Uma Chakravarti in the 1990s. She argued that gender relations in India cannot be understood in isolation from caste relations. The caste system requires strict control over women's sexuality and reproductive capacities to maintain caste purity and hierarchy. At the same time, gender hierarchy and women's subordination are crucial for perpetuating caste distinctions.

Brahmanical patriarchy refers to a social system in India where the caste hierarchy, specifically, the domination of Brahmins, intertwines with patriarchal structures. It enforces gender roles that prioritise male dominance, subjugating women, especially from lower castes, upholding traditional caste and gender inequalities. Some key features of Brahmanical patriarchy include: 1) Emphasis on female chastity and purity, 2) Restrictions on women's mobility and sexuality, 3) Tight control over marriage alliances, 4) Valorisation of motherhood within marriage and 5) Different standards of sexual morality for men and women. The ancient Hindu law book *Manusmriti* codified many of these patriarchal norms. It prescribed that women should be under male control throughout their lives - by fathers in childhood, husbands in youth and sons in old age. The text also laid down rules for endogamy (marriage within caste) and laid great stress on women's chastity to maintain caste purity.

Two organising principles of the Brahmanical social order are caste hierarchy and gender hierarchy. Both are closely interconnected. Here the major concern is the relationship between caste and gender. The significant matter in this respect is the need for effective sexual control over upper caste women to maintain caste purity as well as patrilineal succession. The purity of women is of great importance in Brahmanical patriarchy. Caste structure is achieved through the highly restricted movement of women or even through female seclusion.

The three elements in the establishment of the social order in India shaping the formation of Brahmanical patriarchy are the process of caste, class and gender stratification. But it took a considerable point of time to evolve into its structure. There are some indications that during the pre-historic cultures women's role in production and reproduction was regarded as valuable. In a cave paintings study at Bhimbetka (5000 BCE) it has been found that women were engaged in gathering fruit and other wild produce. It is also seen in the painting, a woman with a basket slung across her shoulders with two children in it. Reproductive power of women in such a hunting society was regarded as valuable.

While Brahmanical patriarchy impacted all women, its manifestation varied across castes. Upper caste women faced greater restrictions on their mobility and sexuality, but also enjoyed higher social status as "respectable" women. Lower caste and Dalit women had relatively more freedom of movement as many worked outside the home, but were considered "impure" and faced sexual exploitation by upper caste men. Chakravarti notes: "The three structural components of Brahmanical patriarchy - caste, class

▶ Brahmanical patriarchy

▶ Intersecting caste and gender hierarchies

▶ Evolution of Brahmanical patriarchy

and gender - are tightly interwoven. The subordination of women achieves two important purposes simultaneously: it produces upper caste purity and it reproduces the entire caste system by carefully guarding women's sexuality." For instance, child marriage was more prevalent among upper castes to ensure girls were married before puberty and there was no chance of them engaging in premarital relationships. Widow remarriage was prohibited for upper caste women but allowed for lower castes. The practice of *sati* (widow immolation) was mainly confined to upper castes. An analysis of Brahmanical patriarchy in early India reveals the fact that the structure of social relations which shaped gender was reproduced by achieving the consent of women. In ancient India, the values of the caste system were accepted by both men and women of the upper castes.

► *Varied impacts across castes*

The colonial period saw some shifts in gender-caste dynamics. The British introduced laws prohibiting practices like sati and child marriage. Some social reformers championed women's education and widow remarriage. However, these reforms were largely limited to upper caste women. In the post-independence era, the Indian Constitution guaranteed equal rights to women and prohibited discrimination based on caste. However, patriarchal norms rooted in caste hierarchy have proven remarkably resilient. Inter-caste marriages are still rare and often face violent opposition. "Honour killings" of couples who marry outside caste continue to occur. At the same time, access to education and employment has expanded opportunities for women across castes. Lower caste women's movements have emerged to challenge both gender and caste oppression. However, they often face backlash from men of their own communities who see women's empowerment as a threat to caste solidarity.

► *Colonial and post-colonial shifts*

In contemporary India, the intersections of caste and gender continue to shape women's lives in multiple ways: 1) Marriage practices: Endogamy remains the norm across castes. "Love marriages" face opposition, especially if inter-caste. Dowry demands are often justified as needed to marry into a higher status family. 2) Education: While girls' education has increased, dropout rates are higher for lower caste girls. Dominant caste prejudices affect Dalit girls' treatment in schools. 3) Employment: Occupational segregation along caste lines impacts women's work options. Sexual harassment of Dalit women workers is common. 4) Politics: While reservations have increased women's political representation, most women politicians come from dominant castes. Dalit women leaders face intersectional discrimination. 5) Violence: Sexual violence against lower caste women is often used as a tool to reinforce caste power. Victim-blaming attitudes

► *Contemporary caste-gender intersections*

are shaped by caste stereotypes. 6) Family: Household gender dynamics vary across castes. Lower caste women may have more decision-making power but also bear greater economic burdens.

Various social movements have challenged different aspects of Brahmanical patriarchy over time. The 19th century social reform movements focused on issues like widow remarriage and women's education, but largely within a upper-caste framework. The nationalist movement saw greater participation of women but also reinforced ideals of "respectable" Indian womanhood. The women's movement since the 1970s has addressed issues like dowry, domestic violence and sexual harassment, but has been critiqued for not centering caste. Dalit feminism emerged in the 1990s to highlight the specific oppression faced by Dalit women and challenge s*avarna* (dominant caste) feminism. LGBTQ+ movements have questioned heteronormative aspects of caste-based marriage systems. While these movements have made some gains, dismantling Brahmanical patriarchy remains an ongoing struggle. Any effort to challenge gender hierarchy in India must necessarily engage with dismantling caste as well.

▶ *Ongoing intersectional struggles*

1.3.2 Occupational Hierarchy and Social Divisions

The caste system in India has historically been closely tied to occupational divisions. Different castes were associated with specific hereditary occupations, creating a hierarchical division of labour. This occupational hierarchy both reflected and reinforced social divisions based on notions of purity and pollution. In ancient India, the *varna* system classified society into four broad categories - Brahmins (priests/teachers), *Kshatriya*s (warriors/rulers), *Vaishyas* (traders/merchants) and Shudras (labourers/artisans). Below these four *varnas* were the "outcastes" or "untouchables" who performed the most menial and ritually polluting work. Over time, this system evolved into thousands of endogamous *jati*s (sub-castes) associated with particular occupations. The anthropologist M.N. Srinivas noted that this occupational specialisation allowed caste groups to be "book-keeping devices" in which memories of who owed what to whom could be preserved.

▶ *Caste-based occupational divisions*

Some key features of the traditional caste-based division of labour: 1) Hereditary nature: Occupations were inherited, with sons following their fathers' professions. 2) Hierarchical: Occupations were ranked, with intellectual and religious work at the top and manual/polluting work at the bottom. 3) Interdependence: Different caste occupations were meant to complement each other in village economies. 4) Restrictions: Lower castes were prohibited from

taking up occupations of higher castes. 5) Ritual considerations: Notions of purity and pollution influenced which work was done by which caste. The fourfold functional division of society is as per occupational hierarchy. Accordingly, the first division was the Brahmins, who were priests. The second was the Kshatriyas who were warriors and rulers. The Vaishyas were the third category and they were traders. The fourth category was the Shudras who were assigned the work of artisans and servants. This kind of social division is enshrined in many classical texts.

According to Fox, there is more than one *Varna* scheme of classification in India. He further made clear that *varna* should be understood as an ideological device which merges castes into larger status categories of classifications. (Fox-1969) Dumont is of view that caste is an institution unique to the Hindus. Hence he is very critical of scholars who regard it as yet another form of social stratification. According to Dumont it is this principle of subordination of status to power that underlines the vedic institution of *Varna.* Thus *Varna* dividing society into four orders, Brahmin (Priest), *Kshatriya*s (Warriors), Vaisya (Traders and agriculturist) and *Shudra* (menial). Dumont further makes clear that *Varna* presents the purest example of hierarchy. It is true that there is no distinct word for hierarchy in an Indian language. The source of Dumont's basic understanding of caste was ancient Brahmanical theory. He made it clear that sometimes the rules devised by Brahmins run counter to hierarchy.

It is to be noted that caste society is holistic and hierarchical and it is inimical to individualism. *Varna* and Jathi are the two models of caste system operating in India. *Varna* is the Vedic classification of the four ranked occupational orders. At the same time *Jati* is purely a local system of ranked heredity. The difference between *Jati* and *Varna* is to be realised. The total number of independent *Jatis* in a small region may vary from a minimum of 10 to about 30 while the number of *Varna* is different. As already stated, the two features of *Varna* are the distinction between status and power. Here we find the subordination of power to status. '*Dharma*' is translated as status and "Artha" as power in Hindu terminology. Therefore Dumont equates the *Brahmin Varna* to *Dharma* and *Kshatriya*-Vaisya *Varnas* to *Artha*.

The colonial period saw some changes in the occupational structure. The British introduced new professions and expanded opportunities in government service, which were largely taken up by upper castes. At the same time, traditional artisanal occupations declined due to competition from machine-made goods. After independence, the Constitution of India prohibited discrimination in public employment based on caste. Affirmative action policies

▶ *Colonial and post-colonial shifts*

like reservations in government jobs were introduced for Scheduled Castes and Tribes. The expansion of the public sector and growth of modern industries created new employment avenues. However, studies show that caste continues to play a significant role in determining occupational outcomes: 1) Over-representation of upper castes in high status professions like medicine, law, academia etc. 2) Concentration of Dalits and Adivasis in manual, low-paid work, 3) Persistence of caste-based occupations in rural areas, 4) Discrimination in hiring and promotions faced by lower castes, 5) "Glass ceiling" effect limiting upward mobility of marginalised castes.

▶ *Contemporary occupational patterns*

Recent research highlights how caste shapes labour market outcomes in both rural and urban India: **Rural Areas**: Agricultural labour is still dominated by lower castes while land ownership is concentrated among dominant castes. Traditional caste occupations like pottery, weaving etc. continue but face decline. Non-farm employment opportunities are often monopolised by locally dominant castes. Manual scavenging, despite being legally banned, is still practiced by some Dalit sub-castes. **Urban Formal Sector**: Upper castes are over-represented in white collar jobs, especially at senior levels. Dalits and Adivasis are under-represented in the private sector. Caste networks play a role in hiring, especially in small and medium enterprises. Discrimination in promotions and wages documented in several studies. **Urban Informal Sector**: Occupational segregation along caste lines in many trades (e.g. waste picking, construction work). Caste-based restrictions in accessing credit, raw materials etc. Social networks based on caste crucial for getting work. **Self-Employment**: Upper castes more likely to be entrepreneurs, especially in knowledge-intensive sectors. Dalits face barriers in starting businesses due to lack of capital and social networks. Some government schemes to promote Dalit entrepreneurship introduced.

▶ *Caste in the new economy*

The growth of the IT and services sectors since the 1990s was expected to create a more merit-based economy less influenced by caste. However, research shows that caste continues to matter even in these modern sectors: 1) Over-representation of upper castes, especially Brahmins, in the IT workforce, 2) Role of caste networks in recruitment, especially campus placements from elite institutions, 3) Subtle forms of discrimination and exclusion faced by Dalit employees, 4) Lack of diversity at leadership levels in major IT companies, 5) Reproduction of caste hierarchies in global delivery models (with India-based workers in subordinate positions). At the same time, education and urbanisation have created new avenues for some from marginalised castes to enter professional careers.

Reservation policies have increased representation of SCs, STs and OBCs in government jobs and higher education. The expansion of the private sector has also opened up new opportunities. However, inter-generational occupational mobility remains limited for historically marginalised groups. A 2018 study found that in urban India, the probability of a Dalit ending up in the highest occupational category was still one-fourth that of an upper caste person.

▶ *Multi-pronged approach needed*

Addressing occupational segregation and discrimination based on caste requires multi-pronged interventions: 1) Strengthening implementation of anti-discrimination laws in employment, 2) Extending reservation to private sector jobs, 3) Promoting diversity and inclusion initiatives in corporates, 4) Supporting Dalit entrepreneurship through targeted schemes, 5) Enhancing skill development and quality education for marginalised groups, 6) Challenging stereotypes about capabilities of different castes, 7) Documenting and publicising instances of caste discrimination in modern sectors. Some scholars argue that completely detaching caste from occupation may not be possible or even desirable in all cases. Instead, the focus should be on ensuring dignity, fair wages and social mobility across all occupations. Ultimately, creating a more equitable labour market will require tackling the wider structures of caste inequality in Indian society. Economic policies need to go hand in hand with social and educational measures to truly level the playing field.

1.3.3 Untouchability and Social Exclusion

Untouchability - the practice of ostracising a minority group by segregating them from the mainstream by social custom or legal mandate - has been one of the most pernicious aspects of the caste system. Despite being legally abolished, it continues to be practiced in various forms across India, resulting in the social exclusion of Dalit communities. The concept of untouchability considered to have emerged sometime in the post-Vedic period (after 600 BCE) and became an integral part of the caste system by the time of the Gupta Empire (4th-6th century CE). It was based on the notion that certain groups were permanently impure and that even their touch could pollute others.

▶ *Historical roots of untoucbability*

Some key aspects of traditional untouchability practices: 1) **Physical segregation**: Separate settlements for untouchables outside village boundaries, 2) Restrictions on use of public spaces and resources (wells, temples etc.), 3) Prohibitions on inter-dining and inter-marriage with other castes, 4) Assigning of ritually 'impure' occupations like scavenging, disposal of dead animals etc., 5) Elaborate rules of avoidance to prevent even accidental

contact, 6) Severe punishments for violating caste norms. Dr. B.R. Ambedkar described the condition of untouchables as a "system of graded inequality in which there are two groups - Touchables and Untouchables - in which one group is above the other and the latter is subjected to the most stringent social and economic handicaps and discriminations."

The Constitution of India abolished untouchability under Article 17 and made its practice in any form a punishable offense. Subsequent laws like the Protection of Civil Rights Act (1955) and the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act (1989) further strengthened legal protections for Dalits. However, social attitudes and practices have been slow to change. Various studies have documented the persistence of untouchability in both overt and covert forms: 1) Segregation in housing, with separate Dalit settlements in many villages, 2) Discrimination in access to common resources like water sources, 3) Social boycotts of Dalits who assert their rights, 4) Refusal to sell land to or buy produce from Dalits, 5) Separate utensils for Dalits in restaurants in some areas, 6) Barriers to entry in temples and participation in religious festivals, 7) Discrimination in schools, including segregated seating and mid-day meals, 8) Continuance of manual scavenging despite legal bans.

A 2006 study titled "Untouchability in Rural India" surveyed over 560 villages across 11 states. It found that untouchability was practiced in 80% of the villages in some form or the other. The study revealed both 'traditional' forms of untouchability as well as new forms emerging in the modern context. While blatant forms of untouchability have reduced, Dalits continue to face various forms of social exclusion: Economic Exclusion: Discrimination in hiring and wages in private sector jobs, barriers to accessing credit and markets for Dalit entrepreneurs, landlessness and dependence on dominant castes for employment in rural areas. Educational Exclusion: Higher dropout rates among Dalit students, discriminatory treatment by teachers and peers in schools, under-representation in higher education, especially elite institutions. Political Exclusion: Limited substantive political power despite reservations, proxy candidates in reserved seats controlled by dominant castes, violence and intimidation to prevent Dalits from voting or contesting elections. Social and Cultural Exclusion: Restrictions on participation in religious and cultural events, limited social interactions and inter-dining with other castes, negative stereotypes and prejudices in popular culture and media. Spatial Exclusion: Segregated housing in both rural and urban areas, denial of access to common spaces and public services, forced evictions and displacement for 'development' projects.

The continued practice of untouchability and various forms of social exclusion have severe impacts on Dalit communities: 1) Poverty and economic marginalisation, 2) Poor health outcomes due to limited access to healthcare and sanitation, 3) Educational backwardness and lack of social mobility, 4) Low self-esteem and internalised stigma, 5) Vulnerability to violence and atrocities, 6) Limited access to justice due to biases in law enforcement, 7) Political disempowerment and lack of substantive representation, 8) Intergenerational transmission of disadvantage, 9) Forced migration to urban areas in search of anonymity and opportunities, 10) Mental health issues stemming from constant discrimination and exclusion. A 2014 study by the Indian Institute of Dalit Studies found that social exclusion leads to significant losses in terms of income, education and health for Dalit communities. The study estimated that the cost of social exclusion for Dalits amounts to 3% of India's GDP annually.

Multifaceted negative impacts

Despite facing systemic oppression, Dalit communities have a long history of resistance and assertion of their rights: 1) Anti-caste movements led by leaders like Jyotirao Phule and B.R. Ambedkar, 2) Dalit literature and cultural movements asserting Dalit identity and experiences, 3) Dalit political parties and pressure groups demanding policy changes, 4) Legal activism using SC/ST Prevention of Atrocities Act and other laws, 5) Conversion movements to Buddhism and other religions to escape caste hierarchy, 6) Dalit capitalism - promoting entrepreneurship among Dalits, 7) Social media campaigns highlighting caste discrimination and violence, 8) International advocacy bringing global attention to caste-based discrimination. These movements have achieved some gains in terms of legal protections, affirmative action policies and raising awareness about caste oppression. However, the struggle against untouchability and social exclusion remains ongoing.

Ongoing struggle for rights and dignity

Eradicating untouchability and promoting genuine social inclusion of Dalits remains a major challenge. Some key issues that need to be addressed: 1) Strengthening implementation of existing laws against caste discrimination, 2) Addressing emerging forms of untouchability in urban and modern contexts, 3) Enhancing economic opportunities and entrepreneurship among Dalits, 4) Promoting inter-caste social interactions from an early age through education, 5) Changing social attitudes through awareness campaigns and popular media, 6) Ensuring diversity and representation of Dalits in positions of power, 7) Addressing intersectional oppression faced by Dalit women, 8) Building solidarities between Dalits and other marginalised groups. Scholars argue that along with legal and policy measures, there is a need to challenge the ideological foundations

Multi-pronged approach for inclusion

of caste hierarchy. This requires reimagining social relations based on principles of equality, fraternity and human dignity.

1.3.4 Exclusion and Brahmanical Ideology

The social exclusion of Dalits and other marginalised groups in India is deeply rooted in Brahmanical ideology - the worldview that underlies and justifies the caste system. This ideology, which emerged in the late Vedic period and was codified in various Hindu texts, has shaped social relations in the subcontinent for over two millennia. Some key features of Brahmanical ideology that contribute to social exclusion: 1) *Varnashrama Dharma*: The idea that society is naturally divided into four hierarchical *varnas* (*Brahmin*, *Kshatriya*, *Vaishya*, *Shudra*) based on inherent qualities and duties. 2) *Karma* and Rebirth: The belief that one's current position in the caste hierarchy is a result of actions in past lives, thereby justifying inequality. 3) Purity and Pollution: Notions of ritual purity associated with upper castes and pollution with lower castes and certain occupations. 4) Endogamy: Strict rules against inter-caste marriages to maintain caste boundaries and hierarchy. 5) *Dharma*: The idea of caste duty, where following one's prescribed caste occupation is seen as moral and going against it as *adharma* (immoral). 6) Divine Sanction: Presenting the caste order as divinely ordained and therefore unquestionable. 7) Hereditary Specialisation: The idea that skills and aptitudes are inherited within castes, justifying occupational segregation.

> ► *Core principles of Brahmanical ideology*

These principles work together to create an ideological framework that naturalises social hierarchy and exclusion. As Dr. B.R. Ambedkar noted, "The caste system is not merely a division of labour. It is also a division of labourers." The Brahmins enjoyed top most position as per *Varna* System and their supremacy started in India right from the Vedic period onwards. They also enjoyed good relations with the *Kshatriya*s and *Vaishyas*. They together gave *Shudras* the fourth position in *Varna* system and that was a later origin. During the initial stage there were only three *Varnas* and they are included in the lineage. The Shudras, the fourth caste is not included in the lineage. Social exclusion was applicable to the untouchable and backward class people. The Brahmins wanted to protect their racial purity better than any other *Varna* discrimination compiled by the others. Social exclusion of untouchable and backward class people was the need of the Brahmanas which enjoyed the support of Kshatriyas, Vaishyas and Shudras.

> ► *Brahmanical supremacy and exclusion*

The development of Brahmanical ideology can be traced through various texts: 1) Late Vedic Texts (c. 1000-500 BCE):

Early articulations of *varna* categories and ritual hierarchies. 2) *Dharmasutras* and *Dharmashastras* (c. 500 BCE - 500 CE): Detailed codification of caste duties, rules of purity/pollution and inter-caste relations. The *Manusmriti* is a prominent example. 3) Puranas and Epics (c. 300 BCE - 1000 CE): Mythological stories reinforcing caste ideals and duties. 4) Medieval Bhakti Texts (c. 800-1700 CE): While challenging some aspects of caste, often reinforced the basic framework. 5) Colonial-era Reinterpretations (19ᵗʰ-20ᵗʰ century): Attempts to justify caste in terms of racial theories or as an efficient division of labour. These texts, especially the *Dharmashastras*, provided elaborate justifications for social exclusion. For instance, the *Manusmriti* prescribed severe punishments for *Shudras* who attempted to imitate the lifestyle of upper castes or acquire forbidden knowledge.

Brahmanical ideology has been reproduced and internalised through various means: 1) Religious rituals and practices reinforcing caste distinctions, 2) Oral traditions and folklore transmitting caste norms, 3) Sanskrit education restricted to upper castes, controlling knowledge production, 4) Patronage systems supporting Brahmanical scholarship and arts, 5) Caste endogamy maintaining "purity" of bloodlines and inheritance of status, 6) Legal codes incorporating caste principles, even under non-Hindu rulers, 7) Socio-economic structures aligning with ideological prescriptions. This pervasive ideological framework made caste hierarchy seem natural and inevitable, leading to its internalisation even among groups it oppressed. As the sociologist M.N. Srinivas noted, lower castes often accepted their subordinate status as part of the divine order.

While Brahmanical ideology became hegemonic, it has faced challenges throughout history: 1) Buddhist and Jain critiques of caste in ancient India, 2) Medieval Bhakti saints emphasising spiritual equality, 3) Modern reform movements like Arya Samaj questioning caste practices, 4) Colonial-era social reformers advocating for caste abolition, 5) Dalit intellectuals like Jyotirao Phule and B.R. Ambedkar systematically critiquing caste ideology, 6) Dravidian movement in South India rejecting Aryan/Brahmanical framework, 7) Marxist analyses of caste as a form of class exploitation. These counter-ideologies have challenged various aspects of Brahmanical thought and created alternative frameworks for social organisation. However, the persistence of caste discrimination shows the continuing influence of Brahmanical ideology.

While explicit endorsement of caste hierarchy has reduced in public discourse, Brahmanical ideology continues to shape social exclusion in subtle ways: 1) Caste-based marriage preferences

justified as "cultural compatibility", 2)Vegetarianism and other upper-caste practices seen as markers of cultural superiority, 3) Sanskrit and "classical" traditions privileged over folk and Dalit cultural forms, 4) Stereotypes about intelligence and aptitude of different castes influencing hiring decisions, 5) Belief in karmic explanations for social inequality, 6) Ritual purity concerns shaping social interactions and spatial arrangements, 7) Caste networks in professional fields justified as "merit-based" connections. Recent studies have shown how these ideological elements continue to influence even educated, urban Indians. A 2018 study found that 27% of Indians still practice untouchability in some form, with the figure being higher among upper castes.

▶ *Subtle persistence of caste ideology*

Efforts to challenge the ideological foundations of social exclusion include: 1) Critical scholarship exposing the historical construction of caste ideology, 2) Dalit literature and arts presenting counter-narratives to dominant representations, 3) Anti-caste movements promoting rationalist and egalitarian worldviews, 4) Constitutional values of equality and social justice as alternative framework, 5) Affirmative action policies challenging notions of inherited merit, 6) Promotion of scientific temper to counter superstitious beliefs related to caste, 7) Inter-caste and inter-faith initiatives breaking down social barriers, 8) Reinterpretation of religious texts to emphasise egalitarian messages. However, scholars argue that more systematic efforts are needed to decolonise minds from caste ideology. This includes revising educational curricula, promoting critical media literacy and creating spaces for inter-caste dialogue and solidarity.

▶ *Need for ideological decolonisation*

1.3.5 Social Exclusion and *Dharma Sastras*

▶ *Nature and scope of Dharma Sastras*

The *Dharma Sastras*, a genre of Sanskrit texts dealing with religious and legal duties, played a crucial role in codifying and legitimising social exclusion within the caste system. These texts, composed roughly between 500 BCE and 500 CE, laid out elaborate rules governing social interactions, rituals and occupations for different castes. Key features of the *Dharma Sastra* tradition: 1) Claimed divine origin or authorship by ancient sages, 2) Presented as authoritative guides for righteous living (*dharma*), 3) Covered both religious rituals and secular laws, 4) Evolved over time with newer texts commenting on and modifying older ones, 5) Interpreted and applied by *Brahmin* scholars in royal courts, 6) Influenced legal systems even under Buddhist and Muslim rule. The most well-known *Dharma Sastra* is the *Manusmriti* (Laws of Manu), but others like *Yajnavalkya Smriti*, *Narada Smriti* and *Parashara Smriti* were also influential in different regions and periods.

▶ *Caste hierarchy in Dharma Sastras*

The *Dharma Sastras* played a key role in institutionalising the caste system by: 1) Defining the four *varnas* and their respective duties (*varnashrama dharma*), 2) Prescribing different laws and punishments for different castes, 3) Regulating inter-caste interactions, including rules on marriage, dining and physical contact, 4) Justifying caste hierarchy as divine order and linking it to *karma* theory, 5) Detailing occupations permitted or prohibited for each caste, 6) Prescribing rituals and lifestyle practices to maintain caste distinctions. For instance, the *Manusmriti* states: "But for the sake of the prosperity of the worlds, he (the creator) caused the *Brahmana*, the *Kshatriya*, the *Vaisya* and the *Shudra* to proceed from his mouth, his arms, his thighs and his feet." (Manu I.31) This origin myth justifies the hierarchical ordering of castes and their supposed inherent qualities.

▶ *Codification of exclusionary practices*

The *Dharma Sastras* contain numerous provisions that institutionalised the exclusion of lower castes, especially the "untouchables": 1) Restrictions on education: Prohibitions on *Shudras* learning the Vedas or even hearing them recited, 2) Occupational segregation: Assigning "impure" occupations to lower castes and outcasts, 3) Spatial segregation: Prescribing separate living areas for different castes, 4) Bodily practices: Rules about clothing, ornaments and gestures to mark caste status, 5) Punishments: Harsher punishments for lower castes committing the same offense as upper castes, 6) Purity and pollution: Elaborate rules about ritual purity and practices of untouchability, 7) Economic restrictions: Limits on property ownership and wealth accumulation by lower castes. For example, the *Manusmriti* prescribes: "But a *Shudra*, whether bought or unbought, he (a *Brahmin*) may compel to do servile work; for he was created by the Self-existent (*Svayambhu*) to be the slave of a *Brahmana*." (Manu VIII.413) Such provisions legitimised and systematised the exploitation and exclusion of lower castes.

▶ *Far-reaching social impact*

The *Dharma Sastras* had a profound and long-lasting impact on Indian society: 1) Provided ideological justification for caste hierarchy and inequality, 2) Shaped social norms and practices across different regions, 3) Influenced legal systems, including under non-Hindu rulers, 4) Created a framework for social control and maintenance of status quo, 5) Internalised notions of purity/ pollution and caste duty among all groups, 6) Limited social mobility and ossified occupational divisions, 7) Sanctioned economic exploitation of lower castes. While actual practices often diverged from textual prescriptions, the *Dharma Sastras* provided a normative framework that shaped social relations for centuries. Even groups not directly under Brahmanical influence often adopted caste-like practices in emulation of this model.

The authority of the *Dharma Sastras* has been challenged by various groups throughout history: 1) Buddhist and Jain texts questioned Brahmanical caste ideology, 2) *Bhakti* saints emphasised direct devotion over caste-based rituals, 3) Sufi and Sikh traditions promoted more egalitarian social relations, 4) British colonisers critiqued certain caste practices as backward while using *Dharma Sastras* for legal administration, 5) Social reform movements in the 19th-20th centuries challenged Sastra-based orthodoxy, 6) Dalit leaders like B.R. Ambedkar called for the "annihilation of caste" and rejection of *Sastra* authority, 7) The Indian Constitution explicitly rejected caste discrimination and untouchability. However, the influence of *Dharma Sastra* ideology persists in various forms in contemporary India.

While the *Dharma Sastras* no longer have formal legal standing in India, their legacy continues to shape social exclusion in various ways: 1) Caste endogamy justified with reference to traditional laws, 2) Vedic rituals and Sanskrit mantras maintaining Brahmin privilege in religious sphere, 3) Internalised notions of caste duty and *karma* influencing occupational choices, 4) Purity-pollution ideas affecting social interactions and spatial arrangements, 5) References to Sastra injunctions in debates on social issues (e.g. women's entry into temples), 6) Continued use of *Dharma Sastra* concepts in personal law for Hindus, 7) Attempts by some groups to revive *Dharma Sastra* based governance. At the same time, there are growing challenges to *Sastra* authority: 1) Constitutional framework of equality and social justice, 2) Dalit and feminist reinterpretations of religious traditions, 3) Secular civil code replacing *Sastra*-based personal laws in many areas, 4) Rationalist movements promoting scientific worldview over traditional beliefs, 5) Increasing inter-caste marriages and social mixing in urban areas. The tension between *Sastra*-based notions of social order and modern egalitarian values remains a key feature of contemporary Indian society.

Summarised Overview

This unit explores the multifaceted nature of caste hierarchy in Indian society, examining its intersections with gender, occupation and social exclusion. It begins by analysing the concept of "Brahmanical patriarchy," which refers to the intertwined nature of caste hierarchy and gender asymmetry. The unit explores how the caste system requires strict control over women's sexuality to maintain caste purity, while gender hierarchy reinforces caste distinctions. Key features of Brahmanical patriarchy, such as emphasis on female chastity, restrictions on women's mobility and differential impacts across castes, are examined.

The unit then delves into the historical and contemporary links between caste and occupational hierarchy. It traces how different castes were traditionally associated with specific hereditary occupations, creating a hierarchical division of labour. The persistence of caste-based occupational segregation in modern India is analysed, including in urban and formal sector employment. The unit explores how caste continues to shape labour market outcomes despite legal prohibitions and changing economic conditions.

The practice of untouchability and its role in social exclusion is a central focus. The unit examines the historical roots of untouchability and its various manifestations, from physical segregation to restrictions on social interactions and access to public resources. The persistence of untouchability in modern forms, despite legal abolition, is analysed. The multidimensional nature of social exclusion faced by Dalit communities, including economic, educational, political and cultural aspects, is explored in depth.

The influence of Brahmanical ideology on social exclusion is then examined. Key features of Brahmanical ideology, such as the concepts of *varnashrama dharma*, *karma* and rebirth and notions of purity and pollution, are analysed for their role in justifying and maintaining caste hierarchy. The unit traces the development of this ideology through various texts and explores how it has been reproduced and internalised over time. Challenges to Brahmanical ideology from various social and intellectual movements are also discussed.

Finally, the unit examines the role of *Dharma Sastras* (ancient legal texts) in codifying and legitimising social exclusion within the caste system. It analyses how these texts institutionalised caste hierarchy through prescriptions for caste duties, rules governing inter-caste interactions and justifications for unequal treatment of different castes. The long-lasting impact of *Dharma Sastras* on Indian society is explored, as well as ongoing contestations of their authority in modern India.

Throughout, the unit emphasises the complex and persistent nature of caste hierarchy in Indian society. It highlights how caste intersects with other forms of social stratification to produce multi-layered systems of privilege and oppression. The ongoing struggles against caste hierarchy and efforts to reimagine Indian society on more egalitarian principles are also examined.

Assignments

1. Analyse the concept of 'Brahmanical patriarchy'. How does it help us understand the intersections between caste and gender oppression in India?

2. Evaluate the persistence of caste-based occupational segregation in contemporary India. What factors contribute to its continuation despite legal prohibitions?

3. Examine the practice of untouchability in modern India. How has it evolved and why does it persist despite legal abolition?

4. Assess the role of Brahmanical ideology in justifying and maintaining social exclusion based on caste. How has this ideology been challenged?

5. Analyse the impact of *Dharma Sastras* on institutionalising caste hierarchy in Indian society. To what extent does their influence persist in modern India?

6. Discuss the multidimensional nature of social exclusion faced by Dalit communities in contemporary India. What strategies have been employed to combat this exclusion?

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.

Social Exclusion and Stratification

BLOCK-02

Social Exclusion and the 'Other'

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

- ♦ understand the historical roots of caste-based exclusion in India
- ♦ analyse how caste-based violence persists in modern India
- ♦ examine the role of religious and ritual exclusion in reinforcing caste hierarchies
- ♦ evaluate the impact of colonialism and modern political movements on caste structures

Background

On September 14, 2020, in Hathras, Uttar Pradesh, a young Dalit woman was brutally assaulted and raped by upper-caste men, resulting in her tragic death weeks later. The incident sparked national outrage, with protests erupting across India. While the assault itself was a horrific crime, what followed added insult to injury: the victim's body was cremated by the police in the dead of night without her family's consent. This incident underscored not only the gruesome nature of caste-based violence but also the systemic complicity that perpetuates these injustices.

This tragic event is a microcosm of the broader social stratification that still shapes India's social fabric. Despite constitutional protections, the legacy of caste remains deeply embedded in both rural and urban India, affecting access to justice, economic opportunities and social mobility. To understand this persistence, it is crucial to explore the historical roots and cultural underpinnings of caste-based exclusion.

Keywords

Caste, Untouchability, Exclusion, Dalit, Women, *Karma*, Empowerment, Social stratification

Discussion

2.1.1 Chandalas and Nishadas: Ancient Social Imagery

The Outcasts of Ancient India

The untouchables were not considered as part of the four *varnas* - lie outside the system- form fifth category- they are a collection of *jati*s who were restricted from performing ritual activities. In ancient Indian society, the Chandalas and Nishadas represented the lowest rungs of the social ladder. The Chandalas, often referred to as "untouchables" in later periods, were those who performed tasks considered impure, such as handling dead bodies or disposing of waste (Jha 1997) (Biswas 2008). Their social exclusion was codified in various religious and legal texts, most notably the *Manusmriti*, which described them as inherently impure and placed them outside the traditional fourfold caste system (*varna*).

The Nishadas, while not always considered untouchable, were similarly marginalised. As hunters and gatherers, they were seen as outside the agrarian and ritualistic society of the Aryans. These groups were often relegated to the outskirts of villages, physically and symbolically distant from the "pure" castes. The exclusion of these communities was not merely economic but deeply intertwined with religious and ritual practices (Jha, 1997) (Biswas, 2008).

2.1.1.2 Religious and Ritual Exclusion

The religious basis for this exclusion is deeply rooted in the Vedic and post-Vedic texts. The *Purushasukta* hymn in the *Rig Veda,* which describes the creation of the four *varnas* from the body of the cosmic being Purusha, lays the foundation for this hierarchical social structure. While Brahmins emerged from the mouth of Purusha, symbolising their role as priests and scholars, the Shudras were born from his feet, a clear indication of their lowly status (Jha 1997). The Chandalas, not even mentioned in this hierarchy, were further excluded from the social order, considered beyond the pale of society.

2.1.2 *Shudras* and Untouchables: Evolution of Social Hierarchies

2.1.2.1 The Role of *Shudras* in Ancient India

The Shudras in Vedic society were primarily labourers, artisans and service providers. Unlike the Brahmins, Kshatriyas and Vaishyas, who enjoyed ritual status and economic privileges, the Shudras were considered ritually impure and excluded from

Marginal notes:
▶ *Chandalas's tasks*

▶ *Nishadas and religious exclusion*

▶ *Reference in Purushasukta*

▶ *Hereditary labour*

religious ceremonies. They were not allowed to study the Vedas or participate in sacrifices, effectively barring them from spiritual salvation as conceptualised in Brahmanical Hinduism (Jha 1997). Over time, the position of the Shudras solidified into one of hereditary subservience, with occupations passed down from one generation to the next.

▶ *Rigidification of roles*

As the agrarian economy of ancient India expanded, the Shudras became essential to the functioning of the society but were denied the rights and privileges of the upper castes. This rigidification of roles became more pronounced during the Post-Vedic period, particularly with the rise of the *Dharma*shastras, which further codified the exclusion of the lower castes(Jha 1997) (Biswas 2008).

2.1.2.2 The Codification of Untouchability

▶ *Evolution of Untouchability*

The concept of untouchability, which would later evolve into the exclusion of Dalits, emerged alongside the consolidation of caste hierarchies. As occupations became more specialised, certain tasks, particularly those associated with death, bodily waste and pollution, were relegated to specific groups, marking the birth of untouchability. These communities were not only socially and economically marginalised but also considered ritually polluting. The very touch of a member of these communities was believed to defile a person from a higher caste(Jha, 1997).

▶ *Codification of untouchability*

The *Manusmriti,* one of the most influential texts in shaping the social and legal codes of Hindu society, played a crucial role in codifying untouchability. It described untouchables in derogatory terms, often comparing them to animals and emphasising their inherent impurity(Biswas 2008). The rise of *Bhakti* and *Vaishnavism* in medieval India offered some respite, as these movements preached the equality of all devotees before God, but the deep-seated prejudices against untouchables persisted(Biswas, 2008).

2.1.3 Ideology and Social Imagery of Exclusion

2.1.3.1 Purity and Pollution: The Ideological Foundation of Caste

▶ *Purity and pollution*

The concepts of purity and pollution form the bedrock of caste-based exclusion in Indian society. According to Vivek Kumar, in Brahmanical Hinduism, purity is associated with ritual cleanliness, birth and occupation, while pollution is linked to activities such as handling dead bodies, working with leather, or engaging in manual scavenging. This ideology of purity and pollution not only justified the exclusion of certain castes but also reinforced the idea

that social mobility was impossible. One's caste was believed to be determined by one's deeds in past lives (*karma*) and therefore, the social hierarchy was divinely ordained.

Notion of Dharma

This ideological framework was further bolstered by the notion of *Dharma*, or duty. Each caste was expected to fulfill its role in society without questioning the inherent inequalities of the system. The Brahmins were tasked with preserving knowledge and performing rituals, while the Shudras and untouchables were expected to serve the higher castes. This rigid system ensured that the lower castes remained at the bottom of the social hierarchy, with little hope of upward mobility. (Jha 1997) (Kumar, 2014).

2.1.3.2 Caste in Practice: Social Exclusion in Everyday Life

Inter-caste exclusion

Village organisation

The exclusion of lower castes was not confined to religious rituals but extended to all aspects of social life. Inter-caste dining and marriage were strictly prohibited and physical proximity to members of the lower castes was considered polluting(Biswas2008). This social exclusion was reinforced by the spatial organisation of villages, where lower castes were often confined to the outskirts, far from the homes of the higher castes. In many parts of India, even the shadow of a Dalit was considered polluting(Biswas 2008).

Present day condition

The practice of untouchability was so deeply ingrained in the social consciousness that even progressive social reformers faced resistance when they attempted to challenge these norms. The rigidity of the caste system ensured that the lower castes remained socially, economically and politically marginalised for centuries (Kumar, 2014).

2.1.4 The Ideology and Reality of Social Exclusion

2.1.4.1 *Karma, Dharma* and Justifying Inequality

Karma and dharma

As discussed, the concepts of *karma* and *dharma* were central to the Brahmanical justification of caste hierarchies. According to this belief system, a person's social position in life was the direct result of their actions in previous lives. Therefore, those born into lower castes were thought to have accumulated bad *karma*, which justified their suffering in this life. This notion of cosmic justice was deeply embedded in Indian thought and provided a powerful ideological tool for maintaining the caste system. *Dharma* dictated that each caste fulfill its role without complaint, ensuring social order.

The doctrine of *karma* effectively silenced any challenges to the established hierarchy. If someone questioned the inequities of

the system, they were seen as defying the divine order and their rebellion was interpreted as an attempt to subvert natural law. This theological framework made caste-based exploitation seem inevitable and immutable. The system was maintained not only through violence and economic coercion but also through religious and philosophical teachings that discouraged social mobility and reinforced the status quo.

2.1.4.2 Social Exclusion in Practice: Segregation and Marginalisation

In daily life, caste exclusion took many forms. For untouchables, segregation was not just physical but extended to every aspect of life, from where they could live to what they could wear, eat and do. They were forced to live on the outskirts of villages, far from the homes of the higher castes and they were denied access to common resources like wells, temples and schools (Biswas 2008). This segregation was enforced through social norms and backed by violence. Even the touch of a Dalit person was considered polluting and in some extreme cases, their shadows were also believed to carry impurity.

The untouchables were also denied participation in public spaces, including markets and places of worship. In many villages, untouchables had to announce their approach by ringing a bell or making a sound to warn higher-caste people of their presence. This practice, designed to maintain ritual purity, was a powerful symbol of the pervasive exclusion that characterised the lives of Dalits.

2.1.5 Caste and Slave Experience

2.1.5.1 Parallels between Caste and Slavery

While caste and slavery are distinct social systems, there are significant parallels between the two. Both systems rely on the dehumanisation of a specific group, stripping them of their rights and subjecting them to forced labour and exploitation. In India, caste functioned as a system of hereditary labour, where certain groups were assigned menial tasks and denied the opportunity for social mobility. This system of labour exploitation shares many similarities with the institution of slavery in other parts of the world(Florio, 2016).

The work of Christopher Florio highlights the parallels between the exploitation of Dalit labour in India and the exploitation of enslaved people in the South America. Both systems were sustained by a combination of economic necessity and ideological justification. In the case of India, the caste system provided a religious rationale for the exploitation of lower-caste labour, while in the South America, slavery was justified on racial grounds (Florio 2016).

The Colonial Encounter: Caste and Capitalism

During the British colonial period, the caste system was both reinforced and transformed by the introduction of capitalist modes of production. The British sought to exploit India's vast labour resources, often relying on caste as a means of organising labour. The lower castes, particularly the Dalits, were forced into roles that mirrored the conditions of slavery in many ways. They were denied land ownership, paid minimal wages and subjected to harsh working conditions (Florio 2016).

Caste and the Politics of Exclusion in Modern India
Colonial Codification of Caste

The British colonial administration played a significant role in codifying and institutionalising the caste system through their legal and bureaucratic frameworks. The introduction of censuses, which classified Indians according to their caste, reinforced the rigidity of caste distinctions(Florio 2016). These classifications were used to organise society and manage labour, but they also reified and institutionalised caste identities in ways that had not been as rigidly enforced in pre-colonial India.

The colonial administration's emphasis on caste as a category of governance served to deepen the divisions within Indian society. While caste had always played a significant role in social organisation, the British transformed it into a tool for economic and political control (Florio 2016). This formalisation of caste in colonial law meant that caste discrimination became embedded in the structures of the state, making it harder to dismantle after independence.

Caste and the Independence Movement

During the Indian independence movement, caste played a complex and often contradictory role. While leaders like Mahatma Gandhi sought to build a unified nationalist movement, the realities of caste-based inequality could not be ignored. Gandhi's approach to caste reform was to encourage upper-caste Hindus to embrace untouchables, whom he called Harijans (children of God), but he stopped short of calling for the abolition of the caste system altogether (Kumar, 2014).

In contrast, Dr. B.R. Ambedkar, himself a Dalit, was a vocal critic of the caste system. Ambedkar's experience of caste discrimination shaped his views on social justice and he argued that the only way to achieve true equality was to dismantle the caste system entirely. His efforts to secure constitutional protections for Dalits and other marginalised groups during the drafting of the Indian Constitution marked a critical turning point in India's struggle against caste-based discrimination (Kumar, 2014).

Post-Independence Struggles: Legal Provisions vs. Social Reality

The Indian Constitution, adopted in 1950, abolished untouchability and guaranteed equality before the law. Article 17 of the Constitution made it illegal to discriminate against anyone on the basis of caste and affirmative action policies were introduced to ensure that marginalised groups, including Dalits, had access to education, employment and political representation (Kumar, 2014). These legal provisions represented a significant step forward in the fight against caste-based discrimination.

However, the social reality of caste discrimination persisted despite these legal reforms. In rural India, where caste-based social structures remained deeply entrenched, Dalits continued to face violence, exclusion and economic exploitation (Kumar, 2014). Even in urban areas, where caste identities were less visible, Dalits were often marginalised in the labour market and in access to housing and education.

Caste in Contemporary India: Social Movements and Resistance
The Dalit Movement: From Ambedkar to the Present

The Dalit movement, which began in earnest under the leadership of Dr. Ambedkar, has continued to evolve in the post-independence period. Ambedkar's call for Dalits to "educate, agitate and organise" became the rallying cry for subsequent generations of Dalit activists. Over the decades, the movement has shifted from a focus on legal rights and affirmative action to broader issues of social justice, dignity and political representation (Kumar, 2014).

In the late 20th century, Dalit movements gained momentum through grassroots activism and the rise of Dalit political parties, such as the Bahujan Samaj Party (BSP). Leaders like Kanshi Ram and Mayawati brought Dalit issues to the forefront of national politics, challenging the dominance of upper-caste political elites and demanding greater representation for marginalised communities (Kumar, 2014). The success of the BSP in Uttar Pradesh, where Mayawati became the state's first Dalit chief minister, marked a significant milestone in the Dalit struggle for political power.

Caste in the Age of Digital Media and Globalisation

The rise of digital media has provided new platforms for Dalits to share their stories, challenge caste-based discrimination and organise for change. Social media has allowed Dalit activists to bypass traditional gatekeepers of information and reach a global audience. Campaigns like #DalitLivesMatter and #JaiBhim have brought attention to issues of caste discrimination in ways that were previously impossible (Kumar, 2014). Films and novels often explore caste themes, address caste discrimination and its impact on individuals. Novels such as "The White Tiger" by Aravind Adiga highlight the struggles of lower castes within a rigid social structure, emphasising the quest for identity and agency.

At the same time, globalisation has created new opportunities and challenges for Dalits. While economic liberalisation has opened up new avenues for employment and social mobility, it has also reinforced existing inequalities in some sectors. In the tech industry, for example, upper-caste individuals still dominate leadership positions, while Dalits are often relegated to lower-paying jobs (Kumar, 2014). The intersection of caste and class in the global economy remains a critical issue for the Dalit movement.

The Future of Caste and Social Stratification

Challenges and Opportunities for Change

As India moves further into the 21st century, the challenges of caste and social stratification remain significant. Despite the legal abolition of untouchability and decades of affirmative action policies, caste-based discrimination continues to shape the lives of millions of Indians. The persistence of caste violence, the marginalisation of Dalits in the labour market and the social stigma attached to lower-caste identities all point to the deep-rooted nature of caste in Indian society (Kumar, 2014).

However, there are also opportunities for change. The rise of Dalit political parties, the increasing visibility of caste issues in the media and the growing influence of global human rights frameworks all offer hope for a more just and equitable future. The fight against caste-based discrimination is far from over, but the resilience of Dalit movements and the commitment of activists to challenging the status quo suggest that progress is possible.

Summarised Overview

Caste-based exclusion in India has deep historical roots, dating back to ancient religious and social practices. The Chandalas and Nishadas, regarded as untouchables, were excluded from mainstream society due to their occupations and perceived ritual impurity. The Vedic texts, particularly the *Purushasukta*, laid the foundation for a rigid caste hierarchy, where the Brahmins, as priests, occupied the highest position and the Shudras, the lowest. Over time, these hierarchies solidified, institutionalising caste-based exclusion through religious doctrines like *karma* and *dharma*.

The birth of untouchability, marked by the assignment of specific "polluting" tasks to certain groups, led to the social and physical segregation of Dalits. The *Manusmriti* further codified this exclusion, reinforcing the notion that Dalits were inherently impure. Although the Bhakti and Vaishnavism movements sought to challenge these hierarchies, caste-based discrimination persisted.

Purity and pollution are two concepts important to the caste system in India, categorising groups based on ritual cleanliness. Higher castes, like Brahmins, signify purity, while lower castes, particularly Dalits, are considered as impure. This ideological framework forms social hierarchies and legitimises discrimination, moulding social dynamics.

Karma and *Dharma* provided theological justifications for caste inequality, portraying social hierarchies as results of past-life actions. This belief discouraged dissent by presenting suffering as deserved and rebellion as defiance of divine order. The ideology ensured compliance and maintained exploitation through religious teachings, economic coercion and social norms.

Caste-based exclusion extended beyond rituals into daily life, with prohibitions on inter-caste dining and marriage and the segregation of Dalits to village outskirts. Practices like untouchability barred Dalits from accessing public spaces and resources, enforcing marginalisation through violence and discrimination. These exclusions persist today, with Dalits facing barriers in education and employment.

Caste in India and slavery elsewhere share parallels in their reliance on dehumanisation and labour exploitation. Dalits were subjected to hereditary menial work, justified by religious beliefs, similar to how slavery in the South America was rationalised on racial grounds. Both systems were sustained by economic needs and ideological frameworks.

Assignments

1. Analyse the historical roots of caste-based exclusion in India.
2. Discuss how colonialism reinforced caste structures in India.
3. Compare and contrast the views of Gandhi and Ambedkar on caste reform.
4. How did the *Manusmriti* influence the codification of caste in Indian society?
5. Evaluate the impact of digital media on modern Dalit activism.
6. Discuss the role of caste in shaping contemporary political movements in India.

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.

Social Stratification and Hierarchy

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

♦ analyse the intersection of caste and gender in shaping social hierarchies

♦ trace the historical roots of caste subordination and bondage

♦ evaluate the persistence of untouchability in contemporary Indian society

♦ comprehend the socio-spatial segregation and its impact on marginalised groups

Background

Almost every day, we hear about many caste-based atrocities happening in India. Many of these cases are not even reported. This highlights the enduring role that caste-based stratification continues to play in shaping the lives of marginalised groups in India, particularly Dalits. The brutal events symbolised not just a heinous act of violence, but also reflected the structural inequalities ingrained in the Indian social system.

The stratification system in India is unique in many ways, with caste, gender, class and religion intersecting to create a complex social hierarchy. Despite legal reforms and social movements aimed at addressing inequalities, caste and gender-based discrimination continue to manifest in various forms, ranging from economic deprivation to violent acts of subjugation. In this unit, we explore how social stratification functions, focusing on caste and gender relations, caste subordination and bondage, untouchability, marginalisation and socio-spatial exclusion.

Keywords

Caste, Gender, Bondage, Untouchability, Socio-spatial Exclusion, Brahmanical Patriarchy, Segregation

Discussion

Social stratification and hierarchy, particularly in the form of caste-based discrimination, continue to shape the lives of millions of people in India. While legal reforms and social movements have made significant strides in addressing caste-based inequalities, much work remains to be done. Caste-based discrimination persists in both rural and urban areas and the intersection of caste with other forms of oppression, such as gender and class, creates complex patterns of exploitation and marginalisation.

Achieving a more equal society requires addressing the root causes of caste-based inequality. This involves not only legal and policy reforms but also a broader cultural shift toward challenging the norms and practices that perpetuate caste hierarchies. It also requires addressing the economic structures that reinforce caste-based exploitation, such as land ownership and access to resources. In addition, addressing caste-based inequality requires recognising the intersectionality of caste with other forms of oppression, such as gender and class. A comprehensive approach to social justice must take into account the ways in which these different forms of oppression interact and reinforce each other.

As India continues to modernise and urbanise, the challenge of addressing caste-based inequality will remain a central issue. The persistence of caste discrimination, even in urban areas, highlights the need for continued efforts to challenge caste hierarchies and promote social and economic equality. Only by addressing the multiple dimensions of inequality can India move toward a more just and equitable society.

2.2.1 Caste and Gender Relations

Caste and gender are two powerful axes of inequality that structure Indian society. Caste determines a person's social status at birth, while gender dictates the roles, responsibilities and expectations associated with being male or female. Together, these two systems reinforce each other, creating complex patterns of domination and subordination. The intersection of caste and gender becomes particularly evident when examining the position of women within the caste system. Upper-caste women, for example, are often seen as custodians of family honor and are subject to strict codes of conduct to preserve caste purity. This control over women's sexuality and reproductive capabilities ensures the continuation of caste hierarchy. Practices such as arranged marriage, dowry and seclusion of women serve to reinforce these boundaries.

▶ Dalit women experience

On the other hand, women from lower castes, particularly Dalit women, are doubly marginalised. They are not only subjugated by patriarchal structures but also face caste-based oppression. Dalit women often occupy the lowest rungs of both caste and gender hierarchies, subjected to exploitation, sexual violence and social exclusion. As feminist scholar Gopal Guru argues, Dalit women experience a "double burden" of caste and gender oppression, which isolates them from both mainstream feminist movements and caste-based social justice struggles.

▶ Brahmanical patriarchy

The theory of Brahmanical patriarchy, proposed by Uma Chakravarti, offers a critical lens through which to understand this intersection. Chakravarti argues that Brahmanical patriarchy operates to maintain caste purity by regulating the sexuality of upper-caste women and relegating Dalit women to positions of servitude and exploitation. This system of control manifests through practices such as child marriage, dowry and the prohibition of inter-caste marriages, which all work to uphold the rigid boundaries of caste.

▶ Sexual violence

Furthermore, gender violence, particularly against Dalit women, is a means of reinforcing caste dominance. Sexual violence is often used as a tool of oppression to "put Dalits in their place." For example, studies show that Dalit women are disproportionately affected by sexual violence, with little recourse to justice due to the complicity of law enforcement and upper-caste power structures. In such cases, gender and caste-based violence intersect to maintain social hierarchies.

Caste, Class and Intersectionality: A Multifaceted Approach to Understanding Hierarchy

While the focus of this unit has been primarily on caste, it is important to recognise that caste does not operate in isolation. Caste intersects with other forms of social stratification, such as class and gender, to create complex patterns of inequality. Intersectionality, a concept popularised by scholars like Kimberlé Crenshaw, provides a useful framework for understanding how multiple forms of oppression interact. In the Indian context, caste, class and gender are deeply intertwined. For example, lower-caste individuals are more likely to be poor and women from lower castes face a "triple burden" of caste, class and gender oppression. As Mitike Shrivastava points out, Indian society is marked by multiple layers of social stratification, where caste, class and gender intersect to shape individuals' opportunities, life chances and social mobility (Shrivastava).The relationship between caste and class is particularly important to

understanding social stratification in India. Karl Marx's theory of class conflict, which centers on the struggle between the bourgeoisie (owners of the means of production) and the proletariat (labourers), can be applied to the Indian context. In rural areas, the upper castes have historically controlled land and other resources, while lower-caste groups, particularly Dalits, have been relegated to menial labour. This class-based exploitation is reinforced by caste hierarchies, which legitimise the economic and social subordination of lower-caste groups. At the same time, class dynamics are also present within caste groups. Not all members of a particular caste share the same economic status. For example, within the Dalit community, there are significant differences in wealth and social standing, with some Dalits having achieved economic success through affirmative action policies or migration to urban areas. However, even economically successful Dalits often face social discrimination due to their caste status. Similarly, gender intersects with caste and class to produce distinct forms of oppression. Upper-caste women may benefit from their caste status but are still subject to patriarchal control within their households. Dalit women, on the other hand, face both caste-based and gender-based discrimination, making them more vulnerable to violence, exploitation and social exclusion. For instance, Dalit women are disproportionately represented in low-wage, informal labour sectors, such as domestic work and agricultural labour, where they are subject to exploitation and abuse. Recognising the intersectionality of caste, class and gender is essential for developing a comprehensive understanding of social stratification in India. Addressing inequality requires not only challenging caste hierarchies but also addressing the ways in which caste intersects with other forms of oppression, such as class exploitation and gender-based violence.

2.2.2 Caste Subordination and Bondage

▶ *Caste-based subordination*

Caste-based subordination has deep historical roots in India and its legacy continues to affect millions of people. Historically, lower castes, particularly Dalits, were subjected to extreme forms of exploitation, including bonded labour and servitude. This system of economic exploitation was not only justified but also perpetuated by religious and social norms, which placed Dalits at the bottom of the social ladder.

▶ *Bonded labour*

Bonded labour is one of the most extreme forms of caste subordination. Although it has been legally abolished, it persists in many parts of rural India, particularly in regions where feudal structures remain strong. Bonded labour ties individuals and families to landowners or employers through debts that they can never repay. These debts are often passed down from one generation to the next, ensuring that lower-caste individuals remain trapped in cycles of poverty and servitude.

Karl Marx's theory of social stratification helps explain how economic and social power is concentrated in the hands of the ruling classes. In Marxist terms, the bourgeoisie (upper castes) own the means of production, while the proletariat (lower castes) provide labour. This relationship creates an exploitative dynamic where the ruling class profits from the labour of the oppressed. In the Indian context, land ownership and control over resources have historically been concentrated in the hands of upper-caste landlords, while lower castes, particularly Dalits, were relegated to menial labour.

Karl Marx's theory of social stratification

This form of caste subordination has not only economic consequences but also social ones. Lower-caste groups are denied access to education, healthcare and political representation, further entrenching their marginalisation. Additionally, caste subordination is reinforced through religious and cultural practices that normalise the inferior status of lower-caste individuals. Ritual purity and pollution norms, for instance, dictate that lower-caste individuals must perform "impure" tasks such as manual scavenging and must avoid physical contact with upper-caste individuals to prevent "pollution."

Social and economic consequences

In contemporary times, caste subordination has evolved but still persists in new forms. While outright bonded labour may be less common, economic exploitation and social exclusion continue to define the lives of many Dalits and lower-caste groups. The informal labour market, for example, is heavily stratified along caste lines, with Dalits and lower castes performing the most dangerous and lowest-paid jobs, such as sanitation work, construction labour and agricultural labour.

Caste subordination in contemporary times

2.2.3 Untouchability and Marginalisation

Untouchability is one of the most egregious manifestations of caste-based discrimination in India. Despite being outlawed by the Indian Constitution in 1950, the practice of untouchability persists in many parts of India, particularly in rural areas. Dalits, who were historically labeled as "untouchables," continue to face systemic exclusion from social, economic and political life.

Persistent practices of exclusion

Untouchability involves the physical and symbolic exclusion of Dalits from spaces and activities deemed "pure" by upper-caste norms. For centuries, Dalits have been forced to live on the outskirts of villages, prohibited from entering temples and denied access to wells, schools and other public spaces. The stigma of untouchability extends to occupations as well. Dalits have traditionally been assigned the most "polluting" tasks, such as manual scavenging, which further reinforces their marginalisation.

Physical and symbolic exclusion of Dalits

The persistence of untouchability is closely linked to the broader system of caste-based marginalisation. Dalits continue to face severe discrimination in education, employment and housing. Although affirmative action policies, such as reservations in education and government jobs, have improved opportunities for some Dalits, the majority remain trapped in cycles of poverty and exclusion. According to reports, Dalit students are more likely to drop out of school due to discrimination and Dalit workers are often paid lower wages for the same work compared to their upper-caste counterparts.

▶ *Untouchability and caste based marginalisation*

M.N. Srinivas's concept of "dominant caste" offers insights into how power operates within caste hierarchies. In many villages, the dominant caste, which controls land, resources and political power, perpetuates the exclusion of Dalits through social and economic control. Dalits, who often rely on dominant caste members for employment or protection, are unable to challenge the system of untouchability without risking their livelihoods or safety.

▶ *Power within caste hierarchies*

Untouchability is not just a rural phenomenon. In urban areas, Dalits often face discrimination in housing and employment. Studies show that Dalits are more likely to be confined to slums or informal settlements and they are often denied housing in upper-caste neighborhoods. Similarly, Dalits face discrimination in the labour market, where they are disproportionately employed in low-wage, hazardous jobs.

▶ *Urban exclusion*

2.2.4 Socio-Spatial Exclusion: Geography of Segregation and Inequality

Socio-spatial exclusion refers to the physical and symbolic segregation of marginalised groups, particularly Dalits, from mainstream society. This form of exclusion is most visible in the spatial organisation of villages and cities, where Dalits are often confined to separate quarters, far from the centers of power and wealth.

▶ *Socio-spatial exclusion*

In rural India, Dalits have historically been forced to live in segregated areas, known as Dalit colonies or hamlets, on the periphery of villages. These segregated spaces are a direct reflection of the social hierarchy, where upper castes occupy the central and most desirable areas of the village, while Dalits are pushed to the margins. This spatial segregation not only reinforces caste-based discrimination but also limits Dalits' access to essential resources such as clean water, education, healthcare and employment opportunities.

▶ *Segregation*

Urbanisation has not significantly altered these patterns of

▶ Urbanisation and patterns of segregation

segregation. While cities offer more anonymity and opportunities for social mobility, caste-based spatial exclusion continues to shape the lives of Dalits and lower-caste groups. Urban slums, where many Dalits and lower-caste individuals reside, are often located on the outskirts of cities, far from economic opportunities and basic services. The lack of infrastructure, sanitation and security in these areas further exacerbates the marginalisation of Dalits.

▶ Arguments of Vamsi Vakulabharanam and Sripad

Vakulabharanam and Sripad Motiram, in their work on caste and space in Indian cities, argue that while Indian cities may seem less segregated than rural areas, caste-based socio-spatial exclusion still persists. For example, while there may be greater physical integration at the larger spatial scale (such as neighborhoods), at smaller scales (such as apartment complexes or housing clusters), caste segregation is more pronounced. Dalits are often confined to informal settlements and slums, which are marked by inadequate infrastructure, limited access to education and healthcare and environmental hazards.

▶ Spatial exclusion and relation with caste

This spatial exclusion is not merely a reflection of economic inequality but is deeply intertwined with caste. Caste discrimination often influences who gets access to housing in desirable areas, who can own land in urban and rural areas and who can benefit from public services. For instance, in some urban spaces, Dalits and other lower-caste individuals face discrimination when trying to rent or buy property, as landlords and property developers refuse to rent or sell to them.

▶ Perpetuating other forms of social exclusion

Additionally, caste-based spatial exclusion plays a significant role in perpetuating other forms of social exclusion. When Dalits are forced to live in segregated areas, their access to education, employment and healthcare is limited. This, in turn, affects their ability to escape the cycle of poverty and marginalisation. For example, schools in Dalit-majority areas often lack resources, qualified teachers and infrastructure, leading to higher dropout rates and lower educational attainment among Dalit children.

▶ Reinforcement of caste-based marginalisation

Ambedkar's critique of the village as a "sink of localism" remains relevant in understanding how socio-spatial exclusion operates in both rural and urban India. He argued that the spatial arrangement of villages, with Dalits relegated to the periphery, not only reflected but also reinforced their social and economic marginalisation. In urban areas, too, the physical separation of Dalits from the centers of power and opportunity serves to entrench their subordinate status.

The Role of the State: Legal Reforms and Social Movements

The Indian state has played a complex role in addressing caste-based inequalities. On the one hand, the Constitution of India, adopted in 1950, explicitly prohibits caste-based discrimination and guarantees equal rights for all citizens. The abolition of untouchability, the introduction of affirmative action policies (such as reservations for Scheduled Castes and Scheduled Tribes in education and employment) and the enactment of laws to protect marginalised groups are all significant steps toward reducing caste-based discrimination. However, the effectiveness of these legal reforms has been limited by the persistence of social norms and practices that perpetuate caste-based inequality. For example, while the law prohibits untouchability, the practice continues in many parts of India, particularly in rural areas. Dalits continue to face exclusion from public spaces, discrimination in access to education and employment and violence at the hands of upper-caste groups.

Affirmative action policies, such as the reservation system, have provided opportunities for Dalits and other marginalised groups to access education and government jobs. These policies have led to the emergence of a new Dalit middle class, which has challenged traditional caste hierarchies. However, the reservation system has also been criticised for being inadequate in addressing the root causes of caste-based inequality. For example, reservations are limited to government jobs and educational institutions, leaving out the private sector, where caste-based discrimination remains prevalent. In addition to legal reforms, social movements have played a crucial role in challenging caste-based inequality. The Dalit movement, led by figures such as B.R. Ambedkar, has been at the forefront of the struggle for social justice and equality. Ambedkar, who was born into a Dalit family, dedicated his life to fighting for the rights of marginalised groups. His work, including the drafting of the Indian Constitution, laid the foundation for legal reforms aimed at addressing caste-based discrimination.

Other social movements, such as the Bahujan Samaj Party (BSP) and the Dalit Panthers, have also played an important role in advocating for the rights of Dalits and challenging caste-based oppression. These movements have sought to mobilise Dalits and other marginalised groups to demand equal rights and challenge the dominance of upper-caste groups in politics and society. Despite these efforts, caste-based discrimination remains deeply entrenched in Indian society. Addressing caste-based inequality requires not only legal reforms but also a fundamental shift in social attitudes and norms. This involves challenging the deeply ingrained beliefs and practices that perpetuate caste hierarchies, as well as addressing the economic and social structures that reinforce caste-based exploitation.

Empowerment Initiatives

The empowerment of Dalits and women in India has been an ongoing struggle shaped by social, economic and political initiatives aimed at correcting historical injustices and promoting equity. Both Dalits and women have faced systemic marginalisation rooted in caste and patriarchy, respectively. Empowerment initiatives have, therefore, focused on breaking down barriers through legislative measures, educational opportunities, political representation and grassroots movements.

The foundation of Dalit empowerment lies in the Indian Constitution, which sought to abolish caste-based discrimination and provide equal opportunities. Article 17 of the Constitution explicitly abolished untouchability, while Articles 15 and 16 prohibit discrimination based on caste, gender and other factors. Additionally, **reservations in education, employment and political representation** were introduced to ensure Dalits and Scheduled Castes (SCs) had access to opportunities that were previously denied to them.

Similarly, women's rights are embedded in the Constitution, with provisions that ensure equality before the law (Article 14) and prohibit discrimination on the grounds of gender (Article 15). Laws like the **Protection of Women from Domestic Violence Act, 2005** and **The Sexual Harassment of Women at Workplace (Prevention, Prohibition and Redressal) Act, 2013** have been instrumental in providing legal recourse to women against abuse and harassment. The **Maternity Benefit (Amendment) Act, 2017** extended paid maternity leave from 12 to 26 weeks, supporting working mothers.

Education has been a key focus in empowering both Dalits and women. For Dalits, **reservation policies in educational institutions** have enabled greater access to primary, secondary and higher education. The government's schemes, such as **Post-Matric Scholarships for Scheduled Castes**, have supported Dalit students financially, helping them pursue higher education. The establishment of **Dr. B.R. Ambedkar Schools** and **Hostels for SC Students** has further supported educational inclusion by providing safe and accessible learning environments.

For women, educational initiatives like *Beti Bachao Beti Padhao* (Save the Girl Child, Educate the Girl Child) have aimed to improve female literacy rates, especially in rural areas where gender disparities are higher. The **Kasturba Gandhi Balika Vidyalaya (KGBV)** scheme provides residential schooling facilities for girls from disadvantaged communities, focusing on rural, backward and minority regions. Increasing female enrollment in schools and higher education has been central to breaking the cycle of poverty and dependence that has historically plagued women.

Economic independence is crucial for the empowerment of Dalits and women. For Dalits, access to employment and entrepreneurship has been facilitated through schemes such as the **Stand-Up India Scheme**, which provides financial assistance

to SC/ST entrepreneurs. The **National Scheduled Castes Finance and Development Corporation (NSFDC)** offers loans at concessional rates for skill development and setting up small businesses, promoting financial independence among Dalits. Government programs such as **Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGA)** also provide employment opportunities, ensuring at least 100 days of wage employment annually, which benefits many Dalits in rural areas.

For women's economic empowerment, the **Self-Help Group (SHG) movement** has been transformative. The SHG movement, particularly under the **National Rural Livelihood Mission (NRLM)**, has encouraged women to pool their resources, access credit and start income-generating activities. This has not only increased household incomes but has also provided women with greater decision-making power. The **Mudra Yojana Scheme** has further supported women entrepreneurs by providing collateral-free loans for small businesses.

Political representation is a key component of empowerment, allowing marginalised groups to participate in governance and influence decision-making processes. For Dalits, political empowerment has been achieved through **reserved seats in the Lok Sabha (Parliament), State Legislative Assemblies and Panchayati Raj Institutions**. This has given Dalits a platform to voice their concerns and advocate for policies that address their unique challenges. The legacy of **Dr. B.R. Ambedkar**, who played a key role in drafting the Constitution and advocating for Dalit rights, continues to inspire Dalit political activism and representation.

Women's political empowerment received a significant boost with the **73rd and 74th Constitutional Amendments**, which reserved one-third of the seats for women in Panchayati Raj Institutions (rural local governance) and urban local bodies. This has brought millions of women into political roles at the grassroots level, enhancing their participation in governance and ensuring their voices are heard in local decision-making. States like Bihar, Odisha and Maharashtra have gone beyond the national mandate, increasing women's reservation in panchayats to 50%.

Social movements have been instrumental in empowering Dalits and women by challenging systemic discrimination and mobilising communities for change. **The Dalit Movement**, spearheaded by leaders like **Dr. B.R. Ambedkar** and later organisations like the **Dalit Panthers**, has focused on asserting the dignity and rights of Dalits, resisting oppression and demanding social justice. These movements have emphasised education, land rights and political participation as central to Dalit empowerment.

Women's empowerment has also been driven by social movements, particularly from the 1970s onwards, with the rise of the **Women's Movement** in India. Organisations like the **All India Democratic Women's Association (AIDWA)** and **Self Employed Women's Association (SEWA)** have worked towards addressing issues such as domestic violence, dowry and workplace rights. **Dalit women's organisations**, such as the **All India Dalit Mahila Adhikar Manch**, have highlighted the intersectionality

of caste and gender oppression, demanding recognition of their unique struggles and advocating for both caste and gender equity.

Empowerment initiatives for Dalits and women in India have evolved significantly, addressing historical injustices and focusing on creating opportunities for these marginalised communities. Through constitutional safeguards, educational initiatives, economic opportunities, political representation and grassroots mobilisation, significant strides have been made. However, the road to true empowerment remains challenging, requiring sustained efforts, social reform and proactive policies that ensure equality and justice for all sections of society. The ultimate goal is to create an inclusive society where Dalits and women can participate as equals, free from discrimination and with the opportunity to fulfill their potential.

Summarised Overview

Social stratification in India is marked by a complex hierarchy where caste and gender intersect to perpetuate domination and exclusion. The intersection of caste and gender, particularly for Dalit women, creates a "double burden" of oppression. This system is rooted in what Uma Chakravarti termed "Brahmanical patriarchy," where upper-caste women are controlled to preserve caste purity and Dalit women are subjected to extreme forms of violence and exploitation.

Caste-based subordination has a long history in India, where lower castes, especially Dalits, were subjected to bonded labour and servitude. While legal frameworks like the Bonded Labour System (Abolition) Act sought to eradicate this practice, bonded labour and caste-based subordination persist in contemporary India, especially in rural areas.

Untouchability, despite being outlawed by the Indian Constitution, continues to shape the lives of Dalits in both rural and urban India. Dalits are excluded from public spaces, denied access to education and healthcare and subjected to degrading tasks like manual scavenging. The concept of "dominant caste" explains how upper castes maintain their power by controlling land, resources and political authority, further marginalising Dalits.

Socio-spatial exclusion is another manifestation of caste hierarchy, where Dalits are relegated to segregated living spaces on the periphery of villages and urban slums. This physical and symbolic segregation limits their access to resources, education and opportunities. As Vamsi Vakulabharanam notes, while cities offer more anonymity, caste-based socio-spatial exclusion remains prevalent in urban areas.

Understanding the intersectionality of caste, class and gender is crucial for addressing social hierarchies in India. While the Indian state has introduced legal reforms to address

caste-based inequality, the persistence of social norms and the complicity of local power structures ensure that discrimination continues. Social movements, such as the Dalit movement, continue to challenge these hierarchies and push for greater social justice. The government made sone empowerment initiatives for Dalits and women in India through constitutional safeguards, educational initiatives, economic opportunities, political representation, etc. The ultimate goal of this initiatives is to create a society where Dalits and women can participate as equals, free from discrimination and equal opportunity to fulfil their potential.

Assignments

1. Discuss how caste and gender intersect to create systems of oppression in Indian society.

2. Analyse the historical roots of caste-based subordination and its contemporary manifestations.

3. How does socio-spatial exclusion perpetuate caste-based inequalities?

4. Evaluate the role of the state in addressing caste-based discrimination in India.

5. Compare the experiences of Dalit women with those of upper-caste women in relation to caste and gender oppression.

6. Discuss the impact of caste-based socio-spatial exclusion in urban and rural 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.

UNIT 3

Village Community and Social Exclusion

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

♦ analyse the role of dominant castes in controlling land and resources in rural India

♦ examine the ways in which labour processes in rural areas are influenced by caste

♦ understand the persistence of caste-based slavery and economic exploitation

♦ evaluate the relationship between caste and class in shaping rural social hierarchies

Background

Despite India's robust legal framework designed to protect marginalised communities, the caste based atrocities underscore the enduring social, economic and political exclusion experienced by Dalits and other lower-caste communities in rural India. These assaults are not any isolated cases of violence; it symbolise a deep-rooted structure of exclusion, where dominant castes maintain their power through violence, land control and caste-based hierarchies. Such incidents bring into focus how the village community functions as a site of social exclusion, where caste-based divisions determine access to resources, political power and social recognition. It reflects the intersection of caste and exclusion in rural India and sets the stage for an exploration of dominant castes and their control over land, labour processes and socio-economic exploitation in village communities.

Keywords

Dominant Caste, Land Control, Labour Exclusion, Bonded Labour, Caste Slavery, Economic Exploitation, Class Relations

Discussion

2.3.1 Dominant Castes and Land Control

M.N. Srinivas defines dominant caste as those who were considered more locally dominant because of their numerical or material socioeconomic strength, regardless of their ritual purity. Land has always been central to the economic and social power structure in rural India. Dominant castes, such as Jats, Yadavs, Reddys and Patels, have historically held control over vast agricultural lands, which has allowed them to wield disproportionate social and political power within their communities. The control of land is not merely an economic issue; it is fundamentally tied to caste-based hierarchies that structure village life. B.R. Ambedkar, a prominent advocate for the rights of marginalised communities, consistently emphasised the importance of land redistribution as a means to dismantle caste hierarchies. He pointed out that the monopoly over land by dominant castes was the material foundation for the perpetuation of caste-based exploitation.

The agrarian structure of rural India is fundamentally linked to caste. Dominant castes not only own most of the land but also control the means of production, including labour, which perpetuates their dominance. Lower-caste groups, particularly Dalits and Adivasis, are often relegated to the status of landless labourers, dependent on the dominant castes for employment and sustenance. The concentration of land in the hands of dominant castes thus ensures their continued control over the economic and social life of the village. This situation has been further entrenched by the failure of land reform policies in the post-independence period. Despite legal provisions aimed at redistributing land to the landless, dominant castes have managed to retain control over vast tracts of land, often through political manipulation and legal loopholes.

The social implications of land control are profound. In many rural communities, land ownership is tied to social status and political power. Dominant castes, as landowners, often hold positions of authority within local governance structures, such as the Panchayats, reinforcing their dominance. This control over land and local governance further marginalises lower-caste groups, who are excluded from decision-making processes that affect their lives. Land control, therefore, functions as a mechanism of social exclusion, where the dominant castes consolidate their power and privilege, while the lower castes remain economically and socially marginalised.

▶ *Dominant castes*

▶ *Land control*

▶ *Position in local governance*

2.3.2 Labour Process and Exclusion

The Indian labour market, particularly in rural areas, is characterised by deep caste-based inequalities. Labour processes in rural India are heavily influenced by caste, with lower-caste groups, especially Dalits and Adivasis, being relegated to the most menial and degrading forms of labour. This exclusion from better-paying and more secure forms of employment is a key mechanism through which caste-based social exclusion is perpetuated. In many parts of rural India, lower-caste groups are confined to agricultural labour, often working as landless labourers for dominant caste landowners.

► *Caste-based labour exclusion*

The labour process in rural India is segmented along caste lines, with dominant castes occupying positions of power and control, while lower-caste groups are relegated to positions of servitude and dependence. This segmentation is reinforced by social norms and cultural practices that dictate the kinds of labour that are appropriate for different castes. For example, Dalits are often forced into jobs considered "polluting" by upper castes, such as manual scavenging, while dominant castes control skilled and better-paying jobs. The exclusion of lower castes from skilled labour markets is not just a reflection of economic inequality but is also a manifestation of social and cultural exclusion.

► *Segmentation along caste lines*

Furthermore, the process of labour exclusion is closely linked to the informalisation of the rural labour market. The vast majority of lower-caste labourers work in the informal sector, where they lack job security, social protection and access to formal labour rights. This informality further exacerbates their economic vulnerability, making it difficult for them to escape cycles of poverty and dependence. Even with the introduction of government programs aimed at providing employment and social security, such as the Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGA), lower-caste workers often face discrimination in access to these programs, as dominant castes control local governance structures and manipulate the distribution of resources.

► *Informalisation of the rural labour market*

The exclusion of lower-caste groups from the formal labour market also has intergenerational effects. The lack of access to quality education and skill development opportunities means that children from lower-caste families are often unable to break free from the cycle of poverty and exclusion. This perpetuates a system where caste determines one's economic prospects and social mobility is severely restricted. As a result, caste-based exclusion in the labour market remains a critical issue that reinforces broader patterns of social and economic inequality in rural India.

► *Restriction of social mobility*

2.3.3 Caste Slavery and Exploitation

► *Caste slavery*

Caste slavery in India has its roots in the historical systems of bonded labour, where lower-caste groups, particularly Dalits, were forced into servitude under dominant caste landowners. While legal frameworks such as the Bonded Labour System (Abolition) Act of 1976 have been introduced to eradicate such practices, caste-based slavery and exploitation continue in various forms in rural India. This form of exploitation is deeply intertwined with the economic structure of the village, where landowners from dominant castes exercise control over landless labourers through debt bondage and other exploitative practices.

► *Ambedkar's critique*

► *Caste and economic exploitatio*

Ambedkar's critique of the caste system extended to its economic dimensions, where he highlighted the close relationship between caste and economic exploitation. He argued that the caste system was not only a social hierarchy but also an economic system designed to exploit the labour of lower castes. In his writings, Ambedkar emphasised the need for land reforms and the redistribution of land to break the chains of economic dependence and exploitation that bound lower-caste communities to dominant caste landowners.

► *Modern forms of caste slavery*

Modern forms of caste slavery often involve the exploitation of Dalit labourers through systems of debt bondage, where individuals are forced to work for dominant caste landowners to repay debts that are often passed down through generations. These labourers are subjected to harsh working conditions, low wages and physical abuse, with little hope of escaping their circumstances. The persistence of such practices highlights the failure of the state to fully implement legal protections for marginalised groups and the enduring power of caste-based hierarchies in rural India (Awanish Kumar,2020).

► *Labour exploitation*

The exploitation of Dalit labourers is not limited to agricultural work but extends to other forms of labour, such as manual scavenging and construction work, where they are subjected to dangerous and degrading conditions. These forms of labour are often characterised by a lack of formal contracts and legal protections, leaving workers vulnerable to exploitation. The intersection of caste and class in these forms of labour exploitation is evident, as lower-caste groups are disproportionately represented in the most precarious and exploitative forms of labour.

2.3.4 Caste and Class Relations

Caste and class are often seen as distinct but interconnected systems of social stratification in India. While caste is a social and religious hierarchy that organises individuals into rigid social

groups, class refers to economic stratification based on access to resources and wealth. However, in rural India, caste and class often overlap, with dominant castes also being the wealthiest landowners and lower castes, particularly Dalits and Adivasis, being among the poorest and most marginalised groups.

Reinforcement of class division

In rural villages, the dominance of certain castes in economic and political spheres creates a situation where caste hierarchy reinforces class divisions. Dominant castes control the majority of land and resources, which allows them to maintain their economic power and social status. Lower-caste groups, by contrast, are often landless labourers who depend on dominant caste landowners for their livelihoods. This creates a cycle of dependence and exploitation, where caste and class inequalities reinforce one another. As K.L. Sharma notes, caste and class are not mutually exclusive categories in India; rather, they are deeply intertwined, with caste often determining one's class position in rural society.

Shaping access to political power

The relationship between caste and class also shapes access to political power in rural India. Dominant castes, as landowners, often control local governance structures, such as Panchayats and use their political power to maintain their economic dominance. This creates a situation where lower-caste groups are excluded not only from economic opportunities but also from political decision-making processes. Even when policies are introduced to promote social inclusion and political representation, such as reservations for Scheduled Castes and Scheduled Tribes, dominant castes often find ways to subvert these policies to maintain their power.

Caste as a barrier in class mobility

The intersection of caste and class also has significant implications for social mobility in rural India. While class mobility may be possible in theory, the rigid structures of caste often prevent lower-caste individuals from moving up the economic ladder. Even when individuals from marginalised castes acquire education or capital, they frequently encounter barriers rooted in caste-based discrimination. For instance, Dalits who acquire land or start businesses often face boycotts, social ostracism and violence from dominant caste members who seek to maintain the traditional social order. As a result, caste serves as a significant barrier to class mobility, limiting opportunities for economic advancement and perpetuating a cycle of poverty and exclusion. Dumont says, mobility is more possible for dominant castes as they have wealth and power.

Mobility for lower caste

How does mobility happen for lower castes? Mobility among lower castes occurs through various means, such as ritual and lifestyle imitation, as well as by breaking away from traditional

caste-based inheritance of occupations. Modernisation also facilitates social mobility.

▶ *Sanskritisation*

Sanskritisation is another avenue for mobility, where lower castes imitate the activities of upper castes, whose language is Sanskrit. This process involves adopting the beliefs, practices and rituals of higher castes to achieve economic and social status advancement. It also includes changes in commensal rules, abstaining from alcohol and adopting vegetarianism, practices traditionally associated with higher castes. However, Sanskritisation is not an easy process. Higher castes often attempt to suppress such mobility and upward mobility typically requires their approval.

▶ *Caste in determining class*

The role of caste in determining class is also evident in the labour market. As discussed earlier, lower-caste groups are often confined to the most menial and low-paying jobs, while dominant castes occupy skilled and higher-paying positions. This segmentation of the labour market along caste lines reinforces class divisions, making it difficult for lower-caste individuals to escape poverty. The exclusion of lower castes from the formal labour market, combined with their concentration in the informal sector, further exacerbates these inequalities. Thus, caste and class operate in tandem to maintain social hierarchies and limit economic opportunities for marginalised groups.

▶ *Evolution of relation*

Furthermore, caste and class relations are not static; they evolve in response to broader social and economic changes. The liberalisation of India's economy and the expansion of the service sector have created new opportunities for some lower-caste individuals to break out of traditional caste-based occupations. However, these opportunities are often limited to urban areas and the majority of rural lower-caste individuals remain trapped in cycles of economic dependence and exclusion. Moreover, even in urban areas, caste continues to play a role in shaping access to education, employment and social networks, demonstrating the enduring power of caste-based discrimination in shaping class relations.

▶ *Rise of new political movements*

The interaction between caste and class is further complicated by the rise of new political movements that seek to challenge the dominance of upper castes and promote the rights of marginalised communities. Movements such as the Dalit movement, led by figures like Ambedkar, have sought to dismantle the caste system and promote economic and social equality. While these movements have made significant gains in terms of legal protections and political representation, the reality of caste-based exclusion and exploitation remains pervasive in rural India. The struggle for caste and class equality is thus far from over and the continued

intersection of these two forms of inequality poses significant challenges for social justice in India.

2.3.5 The Enduring Struggle against Social Exclusion in Village Communities

Nature of social exclusion

The examination of dominant castes and land control, labour processes and exclusion, caste slavery and exploitation and the interplay between caste and class in rural India reveals the deeply entrenched nature of social exclusion in village communities. Despite constitutional protections, legal frameworks and targeted welfare schemes, the realities of caste-based exclusion remain a persistent challenge in rural India. The hierarchical structures that govern land ownership, labour markets and social relations continue to privilege dominant castes while marginalising lower-caste groups, particularly Dalits and Adivasis. Even today, Dominant castes retain control over land ownership, many lower-caste students face discrimination in educational institutions and lower-caste individuals often struggle to access government welfare schemes due to bureaucratic hurdles or social stigma.

Social exclusion in rural India

Social exclusion in rural India is not merely an economic issue but a complex web of social, cultural and political forces that intersect to maintain the dominance of certain groups over others. The concentration of land in the hands of dominant castes ensures their control over the economic and social life of the village, while the exclusion of lower-caste groups from the labour market and political processes reinforces their marginalisation. The persistence of caste-based slavery and exploitation, despite legal prohibitions, highlights the enduring power of caste-based hierarchies in shaping social and economic relations in rural India.

Economic and social dimensions

The struggle against social exclusion in village communities requires a multifaceted approach that addresses both the economic and social dimensions of exclusion. Land reforms, while necessary, are not sufficient to dismantle caste hierarchies; they must be accompanied by efforts to challenge the social norms and cultural practices that underpin the caste system. Similarly, efforts to promote labour rights and social protection for marginalised groups must go beyond economic measures to address the social and cultural barriers that limit their access to opportunities.

Challenge to the caste system

Ultimately, the fight against social exclusion in village communities is a fight for social justice and equality. It is a struggle to dismantle the structures of power and privilege that have maintained caste-based hierarchies for centuries and to create a society where all individuals, regardless of caste or class, have the opportunity to live with dignity and freedom. As Ambedkar

famously said, "Caste is not merely a division of labour; it is a division of labourers." The task before India is to not only address the economic dimensions of exclusion but also to challenge the social and cultural foundations of the caste system that continue to oppress millions of people across the country

Summarised Overview

In rural India, caste and social exclusion are closely tied to land control, labour processes and economic exploitation. Dominant castes have historically maintained control over vast tracts of land, which has allowed them to wield significant social, economic and political power. Land control is a primary mechanism through which dominant castes perpetuate caste hierarchies and ensure the exclusion of lower castes, particularly Dalits, from economic opportunities.

Labour processes in rural India are heavily segmented along caste lines. Lower castes, especially Dalits and Adivasis, are confined to the most menial and degrading forms of labour, such as agricultural work and manual scavenging. The exclusion of lower-caste groups from skilled labour markets limits their social mobility and perpetuates cycles of poverty and dependence.

Caste-based slavery, while legally abolished, persists in the form of bonded labour. Dalit labourers, tied to dominant caste landowners through debt bondage, are subjected to harsh working conditions and economic exploitation. Ambedkar's critique of the caste system emphasised the need for land redistribution and the dismantling of caste-based economic exploitation to break these chains of servitude.

The intersection of caste and class in rural India creates a system where dominant castes control both land and labour, ensuring their economic and political dominance. Lower-caste groups remain economically dependent on landowners, which limits their ability to challenge caste hierarchies or gain political power. Despite legal protections and affirmative action policies, caste-based exclusion remains deeply entrenched in rural communities.

The persistence of caste-based exclusion in rural India highlights the need for comprehensive land reforms, labour rights and social protections. Challenging caste hierarchies requires addressing both the economic and social dimensions of exclusion, including the informal labour market and the concentration of land in the hands of dominant castes.

Assignments

1. Discuss how dominant castes maintain control over land and labour in rural India.

2. Analyse the relationship between caste and class in shaping rural social hierarchy.

3. Examine the impact of land reform policies on caste hierarchies in rural India. How effective have these policies been in redistributing land and breaking caste-based exclusion?

4. Analyse the role of government schemes, such as MGNREGA, in addressing caste-based labour exclusion in rural India. What challenges and limitations exist in implementing such schemes?

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Space for Learner Engagement for Objective Questions

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Caste, Social Exclusion and Structure of Power

BLOCK-03

UNIT 1

Power Structure in Agrarian Society

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

- ♦ understand the concept of *vishti* and *uzhiyam* in agrarian India
- ♦ analyse the evolution of bonded labour in feudal and capitalist contexts
- ♦ explain the roles of *al*, *adiyar*, and *adimai* in agrestic slavery
- ♦ evaluate the impact of neo-bondage in modern agrarian economies
- ♦ discuss the role of labour intermediaries in perpetuating exploitation

Background

In recent news, there was a resurgence of discussions about agrarian distress in India, where thousands of farmers marched to Delhi demanding fair wages, land rights, and debt relief. This event underscores the persistent inequality and power dynamics within agrarian societies, highlighting the importance of understanding the labour conditions and the structures that perpetuate such exploitation. Historically, agrarian societies have been shaped by the control of land and labour, creating a power structure where the dominant classes or castes control the means of production while the labouring classes remain subjugated. The intricate relationship between land, labour, and power has evolved, yet many aspects of exploitation persist in modern forms.

This unit examines the power structure in agrarian societies with a focus on labour conditions, bonded labour, and the historical context of agrarian slavery in India, particularly in South India. Drawing on concepts such as *vishti* (forced labour) and *uzhiyam* (service obligations), as well as examining the role of bonded labour systems like *al*, *adiyar*, and *adimai*, we will explore how labour exploitation and social exclusion have been historically rooted in caste and class relations.

Keywords

Vishti, Uzhiyam, Bonded labour, Agrestic Slavery, Neo-Bondage, Labour Intermediaries, Caste Exploitation

3.1.1 Condition of labour and Agrarian Production: *Vishti* and *Uzhiyam*

3.1.1.1 *Vishti*: Unpaid, Forced labour in Agrarian India

Vishti- Unpaid forced labour

Throughout Indian history, agrarian production has been shaped by various forms of labour control mechanisms, often tied to caste hierarchies and the socio-economic structure of rural life. One of the most prominent forms of labour extraction in South India, particularly in regions like Tamil Nadu and Karnataka, was the system of *vishti*—a form of unpaid, forced labour extracted from lower-caste labourers by the landholding class. The *vishti* system was a feudal obligation, deeply rooted in the caste-based division of labour, where the lower castes were mandated to provide labour to the dominant landholding groups without any form of remuneration.

Vishti and social hierarchy

K.L. Sharma provides an insightful analysis of the *vishti* system, highlighting how it reinforced the rigid caste hierarchy that governed social relations in rural India. Under this system, labourers were required to perform agricultural work as well as other duties, such as the maintenance of village infrastructure or even personal services for the landlord's household. These labour obligations were passed down through generations, ensuring that the lower-caste communities remained economically dependent on the landholding elite. The social exclusion and subjugation that came with this system were severe, as labourers had little to no bargaining power and were often subject to harsh working conditions.

The persistence of the *vishti* system was not solely a result of economic necessity but was also maintained by the socio-cultural structure of rural India, where caste and labour were intertwined. The landholding castes, often belonging to the upper echelons of the caste system, exerted control not only through economic means but also by leveraging their social dominance. This ensured that the *vishti* labourers, who were typically from marginalised communities, had limited mobility and were bound to their land and caste-determined roles.

Labour obligations and social dominance

Unpaid public works and social control

Furthermore, the institutionalisation of *vishti* allowed for its expansion beyond traditional agricultural work. Labourers were often required to engage in activities such as road construction, water canal maintenance, and other public works, which, while

beneficial to the broader village community, were performed without compensation. This unpaid labour served to solidify the power structure within the village, as the upper castes benefitted from both the economic gains of the labourers' work and the social prestige of controlling labour in this manner.

3.1.1.2 *Uzhiyam*: Obligatory Service and Caste-Based Labour

Alongside *vishti*, another prevalent form of labour exploitation in South India was the system of *uzhiyam*. Like *vishti*, *uzhiyam* was a form of obligatory service that primarily affected lower-caste communities. However, while *vishti* was often characterised as unpaid forced labour, *uzhiyam* typically involved labour provided in exchange for access to land or other communal resources. Nevertheless, the system was inherently exploitative, as it required labourers to work under the terms set by the dominant landowning castes, with little room for negotiation or autonomy.

▶ *Exploitive caste labour*

The origins of *uzhiyam* can be traced back to the feudal structure of Indian villages, where land ownership was concentrated in the hands of a few upper-caste families. The lower castes, particularly those who were landless or had minimal landholdings, were forced to rely on the landowners for access to essential resources such as water, grazing land, and even agricultural tools. In exchange for these resources, the lower castes were required to provide labour, often in the form of agricultural work or other menial tasks (Isabelle Guerin). This relationship, while ostensibly reciprocal, was highly unequal, as the landowners held significant power over the terms of the labour exchange.

▶ *Unequal labour exchange*

According to Isabelle Guérin, the *uzhiyam* system reinforced the caste-based division of labour in rural India, ensuring that the lower castes remained economically dependent on the landowning elite. While the labourers were technically "paid" in the form of access to land or resources, the lack of monetary compensation and the social exclusion they faced made it difficult for them to improve their economic situation. Moreover, the system was deeply embedded in the cultural and social fabric of rural life, where caste dictated not only one's occupation but also one's social status and opportunities for mobility.

▶ *Reinforcement of the caste-based division*

Over time, the *uzhiyam* system, like *vishti*, became institutionalised, with labour obligations passed down through generations. This ensured a continuous supply of labour for the landowners, while simultaneously trapping the lower castes in a cycle of dependency and exploitation. The inability to break free from these labour obligations was further exacerbated by the lack

▶ *Institutionalised caste system*

of alternative economic opportunities in rural areas, as well as the social stigma attached to lower-caste status. In this way, *uzhiyam* served as a mechanism for maintaining the power structure within the village, perpetuating both economic and social inequality.

The persistence of *uzhiyam* and similar labour systems has been a focus of debate among scholars. Some argue that such systems were dismantled with the advent of modern agricultural reforms and the introduction of new labour laws. However, as Chitra Joshi points out, hese systems continues to shape labour relations in rural India. While formal *uzhiyam* obligations may have been abolished, the underlying power dynamics remain, with landowners continuing to exert control over labour through informal mechanisms such as debt bondage and sharecropping.

▶ *Dismantlement of Uzhiyam*

3.1.1.3 Persistence of Labour Systems in Modern Agrarian India

While both *vishti* and *uzhiyam* were legally abolished in post-independence India, the power dynamics they created have not entirely disappeared. In many parts of rural India, particularly in South Indian states, these systems have evolved into more covert forms of labour exploitation, often tied to debt bondage and informal labour agreements. Isabelle Guérin and Shrusti Parida note that despite legal protections, many lower-caste labourers continue to struggle.

▶ *Persistent exploitation continues*

3.1.2 Bonded labour and Agrestic Slavery: *Al, Adiyar* and *Adimai*

3.1.2.1 The Evolution of Bonded labour: From Feudal to Capitalist Contexts

Bonded labour, also known as debt bondage, is one of the most enduring forms of labour exploitation in India's agrarian history. Despite the enactment of laws like the Bonded Labour System (Abolition) Act of 1976, bonded labour persists in various forms, particularly in rural regions where caste and class intersect with economic vulnerability. Debt bondage involves labourers—typically from lower-caste or marginalised groups—pledging their labour to repay debts, often with little or no pay. The system becomes self-perpetuating, as debts are passed down through generations, trapping entire families in cycles of servitude.

▶ *Bonded labour persists*

Christine Molfenter has described the historical origins of bonded labour in India, noting that it emerged as a way for landlords and moneylenders to maintain control over the rural labour force. Initially, this system was part of a broader feudal structure, where peasants were tied to the land and the landowner by hereditary

▶ *Associated with debt relations*

obligations. However, with the advent of capitalist agriculture during the British colonial period, bonded labour became increasingly associated with debt relations, as landlords and creditors used loans to entrap labourers into long-term, exploitative contracts.

Creation of a cycle of generational bondage

In this system, workers typically agreed to work for a fixed period in exchange for an advance, but the terms of the contract were heavily skewed in favour of the creditor. The interest on the debt was often so high that it became nearly impossible for the labourer to repay, leading to an extension of the labour contract indefinitely. In many cases, the labourer's descendants inherited the debt, creating a cycle of generational bondage. Isabelle Guérin highlights how this system has been adapted in modern agrarian contexts, where capitalist landowners continue to exploit debt as a tool of labour control.

Entrapment in informal labour agreements

Bonded labour also intersected with caste dynamics, as it disproportionately affected lower-caste individuals who lacked access to land, credit, or legal protection. The caste system, by relegating certain groups to perpetual servitude, provided a convenient framework for the continuation of debt bondage. Even when the legal frameworks for bonded labour were dismantled, the social and economic conditions that sustained these systems were left largely intact. As a result, many labourers found themselves trapped in informal labour agreements that mirrored the conditions of bonded labour, even in the absence of formal contracts.

3.1.2.2 Agrestic Slavery: *Al, Adiyar* and *Adimai*

Agrestic slavery in India represents one of the most extreme forms of labour exploitation, where individuals were legally bound to provide labour to landlords in perpetuity. The terms *al*, *adiyar*, and *adimai* were used in different regions of South India to describe various forms of agrestic slavery, which were deeply intertwined with the caste system.

Debt/ Hereditary obligations

- ♦ *Al*: In Tamil Nadu and parts of Andhra Pradesh, *al* referred to a labourer who was tied to a landlord through debt or hereditary obligations. These labourers were often from the lowest castes, including Dalits, and were compelled to work on the landlord's land without the possibility of escape or negotiation. The *al* system, as Isabelle Guérin explains, was a form of social control that ensured a steady supply of labour for agricultural production while reinforcing the power dynamics of caste and land ownership.

- ♦ *Adiyar*: In many cases, the *adiyar* were labourers who

had pledged themselves or their descendants to work for a landlord in exchange for loans or advances. The *adiyar* system was highly exploitative, as labourers were often unable to repay their debts and thus became permanently tied to the landowner. The system was particularly prevalent in South India, where caste-based labour hierarchies were rigidly enforced. Christine Molfenter points out that, even after the formal abolition of slavery, the *adiyar* system persisted in more subtle forms, as landlords continued to exert control over labour through debt and social.

♦ *Adimai*: The term *adimai* was historically used to describe slaves in Tamil Nadu and Kerala, where lower-caste individuals were treated as property by the landowning elite. Unlike bonded labourers, who were theoretically working to repay a debt, *adimai* labourers were considered permanent slaves, with no hope of emancipation. This system of slavery, though officially abolished in the late 19th century, continued to exist in practice well into the 20th century. The persistence of the *adimai* system highlights the deeply entrenched nature of caste-based labour exploitation in South Indian agrarian societies.

The legal abolition of agrestic slavery in colonial India was often ineffective, as landlords found ways to circumvent the laws by using informal labour agreements, debt bondage, and other forms of coercion. Even in post-independence India, these systems continue to shape labour relations in rural areas, where lower-caste individuals remain vulnerable to exploitation. Christine Molfenter and Shrusti Parida emphasise that the failure to adequately enforce labour laws and provide alternative livelihoods for former slaves and bonded labourers has allowed these systems to persist in various forms.

3.1.3 Labour Control Mechanisms and Capitalist Exploitation

3.1.3.1 Neo-Bondage in the Capitalist Economy

With the rise of capitalist agriculture and the decline of traditional feudal systems, new forms of labour exploitation have emerged in rural India. One of the most pervasive forms of modern exploitation is neo-bondage, where labourers are tied to their employers through debt, wage advances, or informal agreements. Isabelle Guérin and Shrusti Parida have documented how neo-bondage, particularly in industries like rice mills, brick kilns, and

▶ *Work in exchange for loans or advances*

▶ *Slavery system*

▶ *Persistence of agrestic slavery*

▶ *Neo-bondage*

sugarcane harvesting, mirrors the conditions of traditional bonded labour while adapting to a capitalist framework.

▶ *Wage advances*

Neo-bondage typically begins with labourers accepting wage advances from their employers, which they are then required to repay through their labour. However, the wages they receive are often so low that they cannot repay the debt, leading to a situation where the labourer is perpetually indebted to the employer. In many cases, the labour contract is informal, making it difficult for labourers to challenge the terms or seek legal redress. This form of exploitation is particularly prevalent among migrant labourers, who are more vulnerable to exploitation due to their lack of social and legal protections.

▶ *Cycle of debt and exploitation*

In addition to wage advances, neo-bondage is also maintained through social and cultural mechanisms. Labourers often come from marginalised communities, including Dalits and Adivasis, who face significant barriers to accessing education, healthcare, and other basic services. As a result, they are forced to rely on their employers not only for wages but also for food, housing, and other necessities. This creates a situation where the labourer is economically dependent on the employer, making it nearly impossible to break free from the cycle of debt and exploitation.

3.1.3.2 Labour Intermediaries and Debt Relations

▶ *Role of labour Intermediaries*

Labour intermediaries play a crucial role in perpetuating bonded labour and neo-bondage in modern agrarian economies. These intermediaries act as middlemen between labourers and employers, recruiting workers by offering wage advances or loans. While these intermediaries are often seen as facilitators, their role in maintaining labour exploitation is significant. Isabelle Guérin describes how intermediaries use wage advances and debt to tie workers to specific employers, creating a system of dependency that is difficult to escape.

▶ *Short term contracts*

Labour intermediaries often operate in rural areas where formal employment opportunities are limited. They offer labourers short-term contracts, usually for seasonal work, but the terms of the contract are heavily skewed in favour of the employer. The wages offered are often lower than the minimum wage, and the labourers are required to repay the wage advance before they can seek other employment. In many cases, the wage advance is so small that it barely covers the labourer's immediate needs, leading to a situation where the labourer is forced to take out additional loans to survive.

This cycle of debt and labour exploitation is further exacerbated by the lack of legal protections for informal workers. While India has

laws that prohibit bonded labour and guarantee minimum wages, these laws are rarely enforced in rural areas, where labour contracts are often informal and undocumented. As a result, labourers have little recourse when they are exploited by intermediaries or employers. Shrusti Parida emphasises the need for stronger legal frameworks and enforcement mechanisms to protect labourers from exploitation by intermediaries and employers.

Summarised Overview

This Unit explores the power structures in agrarian societies, focusing on labour conditions and exploitation in India. It examines various forms of forced labour, such as *vishti* and *uzhiyam*, which were deeply rooted in caste hierarchies. The unit traces the evolution of bonded labour from feudal to capitalist contexts, highlighting how debt bondage perpetuated cycles of servitude across generations. It delves into agrestic slavery systems like *al, adiyar*, and *adimai*, which tied labourers to landlords through hereditary obligations. The persistence of these exploitative practices in modern forms, such as neo-bondage in industries like brick kilns and sugarcane harvesting, is also discussed. The unit emphasises the role of labour intermediaries in maintaining these systems of exploitation, often through wage advances and informal contracts. Throughout, the intersection of caste dynamics with economic exploitation is a central theme, showing how lower-caste individuals were systematically marginalised and trapped in cycles of poverty and servitude. The unit also touches on theoretical perspectives, including Marxist analyses of agrarian relations and concepts like surplus value extraction. It concludes by examining how these historical practices continue to influence modern labour relations in rural India, despite legal abolitions and social reforms.

Assignments

1. Discuss how did *vishti* and *uzhiyam* reinforce caste hierarchies in agrarian India.
2. Analyse the transition of bonded labour from feudal to capitalist contexts.
3. Compare and contrast the systems of *al, adiyar*, and *adimai* in agrestic slavery.
4. Evaluate the persistence of neo-bondage in modern Indian agriculture.
5. Discuss the role of labour intermediaries in perpetuating exploitative practices.
6. How have caste dynamics influenced labour exploitation in rural 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.

Caste and Peasantry

Learning Outcomes

After the successful completion of the unit, the learner will be able to:

♦ understand the roles of *Raiyats, Asami*, and *Gulami* peasants in agrarian society

♦ analyse landlord-tenant relations in the context of caste hierarchy

♦ explain the functions of Zamindars, Jagirdars, and Nattars in rural power structures

♦ evaluate the impact of *Kadamai* and *Kutimai* systems on lower-caste labourers

♦ discuss the persistence of feudal practices in modern agrarian contexts

Background

The Indian agrarian structure has always been shaped by a combination of caste dynamics and socio-economic hierarchies. One of the most recent and vivid illustrations of this complex relationship was the farmers' protests of 2020-2021. These protests, primarily led by farmers from Punjab, Haryana, and Uttar Pradesh, were a direct response to the three farm laws introduced by the Indian government. The agitation brought into focus not only the grievances of the peasantry against neoliberal economic policies but also the underlying issues of caste-based discrimination and economic stratification. Historically, the lower castes, often serving as tenant farmers or landless labourers, have been systematically marginalised in agrarian relations, with limited access to land ownership and economic resources. The protests highlighted the fears of the farming community about being reduced to mere pawns in a system increasingly controlled by corporate entities, reminiscent of the historical exploitation of peasants by upper-caste landlords.

The modern scenario is deeply rooted in historical practices where land control and agrarian production were dictated by the upper castes. The concept of caste in India is not merely a social construct but a tool that has been used to maintain economic dominance over centuries. The socio-political movements, such as the farmer protests, serve as a lens to understand how contemporary peasantry is influenced by these historical structures. This unit aims to delve into the intricacies of the caste-peasantry nexus by examining the traditional roles of *Raiyats, Asami*, and *Gulami* peasants, landlord-tenant relations, and the impact of systems like Zamindari, Jagirdari, *Kadamai*, and *Kutimai* on rural society.

Discussion

3.2.1 *Raiyats, Asami* and *Gulami* Peasants

▶ *Raiyat classes*

The term "Raiyat" has its roots in the Persian language, which was widely used during the Mughal Empire and later under British colonial administration in India. *Raiyats* were essentially peasant cultivators who tilled the land and were responsible for its productivity. Historically, *Raiyats* were categorised into three broad classes: occupancy tenants, who had hereditary rights to cultivate the land; tenant-at-will, who held land with the permission of the landlord and could be evicted easily; and sub-tenants, who worked under tenant cultivators and had no direct connection with the landowner. The distinction among these classes was crucial, as it determined the level of economic security and social status a *Raiyat* could enjoy (Mohanakumar, 2014).

▶ *Deterioration of Raiyats*

Over time, the socio-economic conditions of the *Raiyats* deteriorated due to the increasing demands for revenue by the colonial rulers and the landlords. The British revenue policies, particularly the Permanent Settlement of 1793, played a pivotal role in transforming the agrarian landscape of India. This settlement favoured the Zamindars and other high-caste landlords, making the *Raiyats* dependent on them for access to land. The *Raiyats*, primarily from lower castes, were trapped in a cycle of debt and poverty, unable to accumulate enough resources to assert their economic independence. The situation was exacerbated by the fact that the caste system inherently restricted their social mobility, preventing them from breaking free from their agrarian roles (Nirmal Sengupta, 1982).

▶ *Asami vulnerabilities*

The "*Asami*" peasants, unlike *Raiyats*, were generally landless and relied on short-term leases or sharecropping arrangements. They often had to agree to exploitative terms, such as giving a substantial portion of their produce to the landowners. This group was even more vulnerable to economic downturns and market fluctuations since they had no security of tenure or long-term rights to the land they cultivated. The *Asami*s' economic plight was often worsened by their caste status, which typically placed them lower in the social hierarchy, further limiting their opportunities for

economic advancement or alternative employment (Mohanakumar, 2014).

The concept of "Gulami" or bonded peasants highlights the most extreme form of exploitation within the peasant community. Gulami peasants were often bound to their landlords through hereditary obligations or debts that they could never repay, leading to a form of modern-day serfdom. This practice was particularly prevalent among the lower castes, including Dalits and other marginalised groups, who had little recourse to legal or economic redress. The perpetuation of this system ensured that social hierarchies remained intact, with the upper castes maintaining control over both the land and the labour force. Bonded labour in India, although legally abolished, continues in various forms, revealing the persistence of these historical patterns of exploitation (Nikhil Kumar & Pravesh Kumar, 2022).

Gulami exploitation

The historical analysis of *Raiyats, Asami* and *Gulami* peasants illustrates the deeply entrenched nature of caste-based discrimination in the agrarian economy. The colonial and post-colonial policies that aimed at land redistribution often failed to address these fundamental issues, as they did not dismantle the socio-cultural barriers that restricted access to resources for lower-caste peasants. This enduring legacy of caste in agrarian relations is evident in the ongoing struggles of the peasantry to gain equitable access to land, credit and market opportunities.

Legacy of caste in agrarian relations

3.2.1.1 Theoretical Framework on Agrarian Relations

The theoretical discourse around peasant societies, particularly Raiyats, Asami and Gulami, is rooted in several key agrarian theories. Marxist agrarian theory is particularly influential in understanding these dynamics. Karl Marx analyzed the relations of production in agrarian societies, emphasizing the class struggles that arise from unequal land distribution and exploitation of labour. According to Marx, the peasants represented a class that was historically subjected to appropriation by landowners and the state, with the mode of production determining their social position and level of exploitation (Nikhil Kumar & Pravesh Kumar, 2022).

Marxist agrarian theory

Marx viewed the agrarian relations in pre-capitalist societies as a conflict between landlords, who controlled the means of production (land) and peasants, who provided labour. This framework helps explain the position of *Raiyats*, who, although they worked on the land, had limited control over it and were subjected to the demands of the landlord class. Marx's concept of "surplus value" is crucial in this context, where the surplus generated by the peasants was

Surplus value

appropriated by landlords in the form of rent, taxes, or tribute, leaving the actual producers with minimal returns for their labour (Nirmal Sengupta, 1982).

Contemporary scholars have also built on Marxist ideas, integrating them with the specific context of Indian caste dynamics. They argue that in the Indian agrarian structure, caste and class often overlap, with lower castes generally being landless labourers or small tenant farmers. The *Gulami* or bonded labour system fits into this framework, where caste-based restrictions ensured that certain groups remained tied to the land and the landlords, unable to break free from their socio-economic constraints. This relationship between caste and land tenure is central to understanding why certain groups, like the Dalits and other backward castes, continue to face structural disadvantages in rural India.

3.2.1.2 Historical Context and Evolution of *Raiyats*

The term "*Raiyat*" has evolved significantly through India's history, with its meaning and status changing under different regimes. During the Mughal period, Raiyats were considered cultivators who had direct relations with the state, paying land revenue directly to the government. This system provided some level of protection to the peasants as they had recognised rights to cultivate the land they worked on. However, the situation drastically changed with the advent of British colonial rule, particularly with the implementation of the Permanent Settlement of Bengal in 1793 (Mohanakumar, 2014).

Under the British, the *Raiyats* lost much of their autonomy as the state shifted its focus towards creating a landed aristocracy through the Zamindari system. Zamindars were given ownership rights over vast tracts of land and Raiyats were reduced to mere tenants. The transition from a relatively balanced revenue system to one that heavily favoured the landlords resulted in severe exploitation of the peasantry. The landlords, incentivised by the state to maximise revenue collection, often charged exorbitant rents, leaving the Raiyats with little to no economic security. This marked the beginning of large-scale peasant indebtedness, a phenomenon that continues to affect rural India to this day (Nikhil Kumar & Pravesh Kumar, 2022).

3.2.1.3 *Asami* Peasants and the System of Sharecropping

The *Asami* peasants were typically involved in sharecropping, a system that placed them in even more precarious positions

compared to the Raiyats. Sharecropping, or "Batai," required the *Asami*s to divide their crop yield with the landlord, often in proportions that left them with minimal returns after covering basic subsistence needs. The nature of these arrangements was deeply exploitative, as the *Asami* peasants bore the risks of crop failure and market fluctuations while the landlords secured their income regardless of agricultural outcomes (Mohanakumar, 2014).

The socio-economic status of *Asami* peasants was further complicated by their caste identities. Most *Asami* peasants belonged to lower castes, including Dalits and other marginalised communities, which made them vulnerable to social discrimination on top of economic exploitation. Their lack of legal rights to the land they worked on meant that they could be easily displaced or replaced by more compliant tenants. This insecurity of tenure not only discouraged long-term investments in the land but also perpetuated a cycle of poverty and social immobility among these communities (Rita Noronha, 2022).

3.2.1.4 Gulami Peasants and Bonded labour Practices

The system of bonded labour, or "Gulami," has historical roots that predate colonial rule but became institutionalised during the British period as a way to control labour in agrarian regions. Gulami peasants were bound to their landlords through debts that were often inherited from one generation to the next, effectively trapping entire families in perpetual servitude. This form of bondage was more prevalent among the lowest strata of the caste hierarchy, such as Dalits and other Scheduled Castes, who were already socially ostracised and economically deprived (Nikhil Kumar & Pravesh Kumar, 2022).

The Indian government's efforts to abolish bonded labour through various legal frameworks, such as the Bonded Labour System (Abolition) Act of 1976, have been only partially successful. The persistence of *Gulami* practices can be attributed to the socio-economic pressures that force individuals from marginalised communities to enter into exploitative labour arrangements due to a lack of viable alternatives. Additionally, these practices continue in disguised forms, such as informal labour agreements that do not offer any legal protection or fair compensation to the workers (Rita Noronha, 2022).

3.2.2 Landlord-Tenant Relations

Landlord-tenant relations in India have historically been dictated by caste-based hierarchies and economic dependencies. During the British colonial period, systems like the *Zamindari* and *Ryotwari*

▶ Landlord dominance

settlements institutionalised these relations, granting immense power to the landlords, who were predominantly from the upper castes. The Zamindars acted as intermediaries between the colonial government and the peasantry, collecting revenue from the tenants and passing it on to the state. This relationship not only secured the Zamindars' social and economic dominance but also reinforced their political power in rural society (Nirmal Sengupta, 1982).

▶ Rent-seeking

One of the critical aspects of landlord-tenant relations was the concept of 'rent-seeking', where the landlords extracted as much surplus as possible from the tenants without making any productive investments in the land. This exploitative practice led to a cycle of poverty and indebtedness for the tenants, primarily from lower castes, who were already at a disadvantage due to their socio-economic status. The landlord's authority was often absolute, with the power to evict tenants at will, particularly if they failed to meet the high demands of rent or crop shares (Rita Noronha, 2022).

▶ Sharecropping issues

The tenant cultivators, known as 'sharecroppers', were usually bound by oral agreements, which provided them with little legal protection. Sharecropping arrangements required tenants to give a substantial portion of their harvest to the landlords, often leaving them with barely enough to sustain their families. This system discouraged long-term investments in agricultural productivity, as tenants had no security of tenure and were reluctant to improve land that did not belong to them. The insecurity of land tenure among the lower caste tenants was a significant factor in perpetuating the cycle of agrarian distress and social exclusion (Mohanakumar, 2014).

▶ Agricultural benefits to the high-ranking groups

In regions like Bihar and Bengal, where the Zamindari system was most prevalent, the landlords maintained a feudal relationship with their tenants, backed by socio-religious customs that reinforced their superior status. These customs were closely tied to caste identities, with the landlords typically belonging to high-ranking groups like Brahmins, Rajputs, or Bhumihars, while the tenants were often from lower castes or tribes. This hierarchical relationship ensured that the benefits of agricultural production remained concentrated in the hands of a few, while the lower castes remained economically dependent and socially marginalised (Nirmal Sengupta, 1982).

Despite various land reform initiatives post-independence, such as the abolition of the Zamindari system, the core issues in landlord-tenant relations persisted. Land reforms were often poorly implemented due to resistance from powerful landowning elites and loopholes in the legislation. As a result, many former

Zamindars continued to wield significant influence over rural land markets, either directly or through proxy ownership, which kept the lower-caste peasants trapped in exploitative tenancy arrangements. The lack of genuine redistribution of land has meant that the socio-economic disparities established during the colonial era continue to shape the agrarian landscape of India today.

3.2.2.1 Historical Overview of Landlord-Tenant Relations

The relationship between landlords and tenants in India is one of the most critical factors in shaping the rural economy and the socio-political structure of the countryside. Historically, this relationship was institutionalised through systems like the Zamindari and Ryotwari settlements under British colonial rule. The Zamindari system, in particular, consolidated the power of the landlords by granting them full ownership rights over the land, while tenants were reduced to serfs with limited legal rights and heavy economic burdens (Nirmal Sengupta,1982).

Landlords, often from the upper castes, used their control over the land to extract maximum economic value from their tenants. This extraction was not limited to agricultural produce; it also included social control mechanisms that reinforced the caste hierarchy. For example, in many rural areas, the power dynamics between landlords and tenants were so entrenched that tenants were compelled to provide additional unpaid labour for the landlord's household or participate in community events that primarily served the interests of the upper castes (Rita Noronha, 2022).

3.2.2.2 Theoretical Perspectives on Landlord-Tenant Relations

From a Marxist perspective, the landlord-tenant relationship is a classic example of the exploitation inherent in feudal and semi-feudal modes of production. Landlords act as the dominant class, owning the means of production (land), while the tenants are the subordinate class whose labour is systematically appropriated. The concept of "ground rent" developed by Marx is crucial to understanding these dynamics. Ground rent refers to the surplus value that is extracted from the tenants' labour, which the landlords claim by their ownership of land (Nikhil Kumar and Pravesh Kumar, 2022).

Neoclassical economic theories, on the other hand, often argue that sharecropping and tenancy arrangements are efficient forms of economic organisation that allow for risk-sharing between landlords and tenants. However, critics of this view point out that

such arrangements also reinforce socio-economic inequalities, particularly in a context like India where these relationships are intertwined with caste-based discrimination. The unequal distribution of land and the lack of secure property rights for tenants limit their ability to negotiate better terms or invest in agricultural improvements, thus perpetuating their dependence on landlords (Rita Noronha, 2022).

3.2.2.3 Regional Variations

The impact of landlord-tenant relations varies significantly across different regions in India. In states like Bihar and Uttar Pradesh, where the Zamindari system was deeply entrenched, the exploitation of tenant farmers was severe, leading to widespread rural poverty and social unrest. In contrast, states like Kerala implemented more successful land reforms that reduced the power of landlords and granted more rights to tenants, resulting in a relatively more equitable agrarian structure (Nirmal Sengupta, 1982).

One notable example is the peasant movements in Bihar during the mid-20th century, such as the Kisan Sabha movement. These movements were primarily driven by lower-caste tenants and landless labourers who demanded better rights and fairer terms of tenancy. Despite facing severe repression from the landlord class and state authorities, these movements laid the groundwork for later reforms aimed at redistributing land and improving the socio-economic conditions of the peasantry (Rita Noronha).

3.2.3 *Zamindar* and *Nattar*, *Jagirdar* and *Virutti*

The role of Zamindars in India's agrarian society cannot be overstated, as they were not merely landlords but also acted as local rulers and enforcers of the caste-based social order. The Zamindari system, which was institutionalised by both the Mughals and later by the British, entrenched a hierarchical structure where the Zamindars were responsible for tax collection and maintaining law and order in their territories. This system gave them control over vast lands and they often acted with impunity, supported by colonial laws that protected their interests over those of the peasantry (Rita Noronha, 2022).

In South India, figures like the *Nattars* and *Jagirdars* played similar roles to their northern counterparts. They were local chieftains or hereditary landlords who controlled large tracts of land and held significant social and political power. The *Nattars* were often from dominant agrarian castes and exercised authority

over the distribution of land, the enforcement of agricultural labour and the settlement of disputes. Their influence was rooted not only in their economic power but also in their traditional roles as community leaders and custodians of local customs (Nirmal Sengupta, 1982).

The concept of "Virutti" in the agrarian economy referred to land grants or privileges awarded to individuals for specific services, often linked to their caste or social status. *Virutti* landholders were typically involved in administrative, military, or religious duties and were rewarded with land that they could cultivate or lease out. This practice reinforced the hierarchical structure of land ownership, as these grants were usually given to individuals from the upper castes, who were already entrenched in positions of authority. The distribution of *Virutti* lands also played a role in maintaining the socio-economic dominance of these groups, as it allowed them to control the local economy and the labour force dependent on these lands (Rita Noronha, 2022).

The Jagirdari system, similar to the Zamindari setup, was prominent in regions like Rajasthan and parts of central India. Jagirdars were local feudal lords who were granted lands in return for military or administrative services to the state. These lands, known as Jagirs, were managed by the Jagirdars, who collected taxes and ensured the region's stability. The socio-political power of the Jagirdars often extended beyond land management to influence local politics and social hierarchies. Like the Zamindars, they too belonged predominantly to the upper castes and their power was intertwined with the caste-based social order that privileged their communities over others (Rita Noronha, 2022).

The control of land by Zamindars, Jagirdars and Nattars created a rigid agrarian society where caste and land ownership were inextricably linked. The peasantry, consisting mainly of lower castes and tribal communities, had little to no access to land ownership, which was essential for economic stability and upward mobility. The grip of these feudal lords over the agrarian landscape meant that any surplus generated through agricultural production largely benefitted them, while the peasants remained in subsistence conditions. Even as India moved towards modern agricultural policies and land reforms, the legacy of these systems continued to cast a long shadow over rural society, perpetuating inequality and social exclusion (Nirmal Sengupta, 1982).

In contemporary times, while the formal structures of Zamindari and Jagirdari have been dismantled, the socio-economic power dynamics established by these systems persist. Large landholders,

often descendants of these traditional landlords, continue to wield significant influence in rural areas, both economically and politically. Their ability to control local governance structures and influence policy decisions ensures that the caste-based stratification of land ownership remains largely intact, posing significant challenges to efforts aimed at achieving agrarian equity and social justice (Rita Noronha, 2022).

▶ *Modern persistence*

3.2.3.1 Theoretical Perspectives on Feudal Structures

The Zamindari and Jagirdari systems can be understood through a lens of feudalism, where land ownership and control were directly tied to socio-political power. According to Marxist theory, feudal societies are characterised by the exploitation of peasants who are bound to provide labour or produce to the landowners. These relations of production were maintained not just through economic control but also through social norms and coercive power structures that reinforced the hierarchical caste system. This theoretical approach helps to explain why the Zamindars, Jagirdars and Nattars could sustain their dominance over agrarian society for centuries (Nikhil Kumar and Pravesh Kumar, 2022).

▶ *Marxist theory*

Pierre Bourdieu's concept of "symbolic power" also provides a useful framework to analyse these agrarian structures. Symbolic power is the ability to impose meanings and norms that seem natural or legitimate, even when they reinforce unequal social relations. The roles of Zamindars and Jagirdars were often justified through their purported roles as protectors of tradition, religion and order in rural areas. This gave them not only economic control but also cultural authority that further marginalised the lower castes and peasantry (Nirmal Sengupta, 1982).

▶ *Concept of symbolic power*

3.2.3.2 Historical Evolution of Zamindari and Jagirdari Systems

The Zamindari system was initially institutionalised during the Mughal Empire as a method of tax collection. However, its impact on Indian society intensified under British colonial rule. The British reinforced and expanded the power of Zamindars to ensure a steady revenue stream for the colonial administration. This transformation turned Zamindars into de facto landowners who could evict tenants at will and impose high rents without any state intervention to protect the peasantry. This shift marked a transition from a relatively balanced agrarian structure under the Mughals to one that heavily favoured a landed aristocracy at the expense of small-scale farmers and cultivators (Rita Noronha, 2022).

▶ *Institutionalisation of Zamindari system*

The Jagirdari system, prevalent in regions like Rajasthan and Madhya Pradesh, operated on a similar principle but with a focus on military and administrative services. Jagirdars were granted land by the state in return for maintaining soldiers or providing other services to the ruler. Unlike the Zamindars, whose power was more economically driven, the Jagirdars' influence also extended into the military sphere, making them powerful regional authorities. This dual role as economic and military elites enabled the Jagirdars to control local governance and dominate agrarian production while reinforcing caste hierarchies (Rita Noronha, 2022).

3.2.3.3 Regional Impact of Zamindari and Jagirdari Systems

In Bihar and Bengal, the legacy of the Zamindari system has impacted the agrarian structure. Despite the abolition of Zamindari through land reforms in the 1950s, the former Zamindars often retained control over the best agricultural lands by manipulating legal loopholes or transferring ownership to family members under different names. This allowed them to exert significant influence over local politics and economy. The enduring control of these families in regions like Patna, Gaya and Darbhanga is a stark reminder of how historical power dynamics can persist even after formal structures are dismantled (Nirmal Sengupta, 1982).

In Rajasthan, the Jagirdari system created a class of powerful local rulers who acted almost as feudal kings within their territories. These Jagirdars controlled vast tracts of land and the local labour force, often demanding unpaid labour or "begar" from lower-caste communities. The socio-political power they wielded was often used to maintain their caste superiority, suppressing any attempts by lower-caste groups to assert their rights or demand fair treatment. Even after India gained independence and attempted to reform landownership patterns, the Jagirdars' influence continued to be felt through their control of local governance and their ability to mobilise traditional social structures to their advantage (Rita Noronha, 2022).

3.2.4 *Kadamai* and *Kutimai*

The terms "*Kadamai*" and "*Kutimai*" refer to traditional systems of duties and labour obligations that were central to the functioning of agrarian society in South India. These systems were deeply rooted in the socio-economic relationships between landlords and peasants, structured in a way that reinforced caste hierarchies and dependency. "*Kadamai*" was a form of rent or tribute that tenant cultivators were required to pay to their landlords. This payment could be made in various forms, including a share of the crop, a

fixed amount of produce, or even labour services. The concept of *Kadamai* tied the peasants to the land they worked on, creating a bond that was as much social as it was economic (Rita Noronha, 2022).

The practice of *Kadamai* was not uniform; it varied significantly depending on the region, the caste of the tenant and the terms dictated by the landlord. Higher caste tenants often had more favourable terms compared to lower caste peasants, who were subjected to harsher conditions and higher tributes. This system ensured that the economic benefits of agricultural production flowed upward to the landlord class, predominantly composed of higher castes, while the lower castes were relegated to the most labour-intensive and least rewarding roles. The rigid structure of *Kadamai* meant that even as agricultural productivity increased, the wealth generated did not translate into better living conditions for the lower-caste peasants (Nirmal Sengupta, 1982).

▶ *Regional variations*

▶ *Social and labour services*

Kutimai, on the other hand, represented a broader set of obligations that went beyond mere economic transactions. It encompassed the social and labour services that lower-caste individuals were required to provide to their landlords or village elites. These services were often hereditary and unpaid, deeply embedded in the feudal and caste-based traditions of the society. *Kutimai* duties could include tasks like tending to the landlord's fields, repairing irrigation systems, maintaining village infrastructure, or even performing domestic work in the landlord's household. This form of labour was exploitative by nature, designed to extract maximum benefit from the lower castes without offering them any significant economic return or social recognition (Rita Noronha, 2022).

▶ *Reinforced social hierarchies*

The practice of *Kutimai* also reinforced social hierarchies by institutionalising the notion that certain castes were born to serve. The hereditary nature of these obligations meant that generations of lower-caste families were trapped in cycles of servitude with little opportunity for social mobility. Even as India progressed towards modernity, the remnants of *Kutimai* continued to influence the socio-economic relations in rural areas, particularly in regions where caste-based discrimination remained deeply ingrained. Efforts to abolish such practices through legal reforms and social movements have often faced resistance from entrenched interests that benefit from the status quo (Rita Noronha, 2022).

In modern rural India, although *Kutimai* is officially banned, the vestiges of this exploitative system can still be observed in various forms of bonded labour and informal arrangements where lower-caste individuals are coerced into providing services to higher-

caste families. These practices persist due to socio-economic pressures, lack of access to alternative livelihoods and the enduring stigma attached to caste-based labour roles. The persistence of such systems underscores the challenge of eradicating caste-based exploitation from the agrarian economy and highlights the need for comprehensive policy interventions to ensure true economic and social equality for all sections of society (Nirmal Sengupta, 1982).

3.2.4.1 Detailed Analysis of *Kadamai* as an Agrarian Obligation

"*Kadamai*" was a multifaceted system of rent or duty that was deeply ingrained in the agrarian economies of South India, particularly in Tamil Nadu and Kerala. It required tenant cultivators, often from the lower castes, to pay a form of tribute to their landlords, who were usually from the higher castes. This payment could take various forms, including a share of the harvest, cash payments, or labour services, effectively binding the peasantry to the land. *Kadamai* was not merely an economic obligation but also a social contract that reinforced the caste-based divisions within rural communities (Rita Noronha, 2022).

► *Payment of tribute*

From a historical perspective, *Kadamai* was a continuation of pre-colonial agrarian practices that were formalised under different regimes. During the Chola and Vijayanagara empires, *Kadamai* was codified as part of the administrative system, where land rights and duties were meticulously recorded. These records often favoured the upper castes, who held the majority of land rights, while the lower castes were relegated to roles that involved providing labour or specific services tied to the land. This system was maintained by both economic pressures and social norms that dictated the roles and duties of different caste groups in rural society (Nirmal Sengupta, 1982).

► *Continuation of pre-colonial agrarian practices*

The persistence of *Kadamai* obligations into the colonial and post-colonial periods can be linked to its adaptability to changing political contexts. Even as British policies introduced new land tenure systems like Ryotwari and Zamindari, the underlying principles of *Kadamai*, where lower-caste tenants were bound to provide economic and social dues to upper-caste landlords, remained largely unchanged.

► *Persistence of Kadamai obligations*

3.2.4.2 Kutimai: The Institutionalisation of Labour Services

"*Kutimai*" referred to a broader array of labour obligations that lower-caste groups were required to perform for their landlords or village elites. This system was particularly prevalent in the

southern states of India, where it became synonymous with the institutionalised exploitation of the lower castes. *Kutimai* included tasks like constructing or maintaining irrigation canals, repairing village infrastructure, performing domestic services in the landlord's home and other community labour that was expected to be done without compensation. These obligations were typically hereditary, passing from one generation to the next, thus perpetuating the cycle of caste-based labour exploitation (Rita Noronha, 2022).

> *Exploitation of Kutimai*

Theoretical perspectives on *Kutimai* can be linked to Max Weber's analysis of status groups and social stratification. Weber emphasised that economic exploitation in society is often supported by status distinctions that are legitimised by cultural beliefs. In the case of *Kutimai*, the idea that certain castes were naturally predisposed to perform labour-intensive and menial tasks was deeply embedded in cultural norms. This belief system not only justified the exploitation but also created a sense of inevitability about the social order, making it difficult for lower-caste groups to break free from these roles (Nirmal Sengupta, 1982).

> *Linking to Weber's analysis*

3.2.4.3 Persistence of Kutimai in Tamil Nadu

A notable case study of *Kutimai* practices can be observed in rural Tamil Nadu, where lower-caste communities, particularly Dalits, have historically been subjected to these hereditary labour obligations. Despite legal bans and social reforms, instances of *Kutimai*-like practices continue to surface in these regions. Modern-day manifestations include bonded labour arrangements in the agricultural sector, where families are compelled to work for landowners under exploitative conditions due to indebtedness or social pressures. These practices highlight the challenges in eradicating caste-based exploitation in agrarian societies, where economic dependency and social stigma still play a significant role (Rita Noronha, 2022).

> *Modern remnants*

Efforts to combat *Kutimai* have included grassroots activism and legal interventions by both state and non-state actors. Organisations dedicated to the rights of Dalits and other marginalised groups have been instrumental in bringing attention to these practices and pushing for stricter enforcement of anti-bonded labour laws. However, the deep-seated cultural acceptance of caste-based labour roles poses significant barriers to the complete eradication of these forms of exploitation. This suggests that while legal measures are necessary, they are not sufficient to address the socio-cultural dimensions that sustain such practices. (Nirmal Sengupta, 1982)

> *Legal and cultural barriers*

Summarised Overview

This Unit examines the intricate relationship between caste and peasantry in Indian agrarian society. It explores the various categories of peasants, including Raiyats, Asami and Gulami and their positions within the caste-based hierarchy. The unit delves into landlord-tenant relations, highlighting how these were shaped by and reinforced caste distinctions. It analyses the roles of powerful figures like Zamindars, Jagirdars and Nattars, who wielded significant influence over land, resources and local governance. The systems of Kadamai and Kutimai are examined as mechanisms that institutionalised labour obligations and social control, particularly over lower-caste groups. The unit emphasises how these structures perpetuated economic exploitation and social marginalisation, often through hereditary obligations and debt bondage. It also discusses the historical evolution of these systems, from pre-colonial times through the British colonial period and their lasting impact on modern rural India. Theoretical perspectives, including Marxist and Weberian analyses, are applied to understand these power dynamics. The unit concludes by examining how, despite legal abolitions and social reforms, many aspects of these feudal and caste-based practices continue to influence contemporary agrarian relations, highlighting the challenges in achieving true economic and social equality in rural India.

Assignments

1. Compare the socio-economic conditions of *Raiyats, Asami* and *Gulami* peasants.
2. How did the Zamindari system reinforce caste hierarchies in rural India?
3. Analyse the role of Jagirdars in maintaining feudal power structures.
4. Evaluate the impact of *Kadamai* and *Kutimai* systems on lower-caste labourers.
5. Discuss the persistence of caste-based exploitation in modern Indian agriculture.
6. How have land reforms affected traditional landlord-tenant relations in India?

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Village Community and Locality Power Structure

Learning Outcomes

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

♦ understand the roles of *Deshmukh*, *Chaudhari* and *Muqaddam* in village governance

♦ analyse the functions of *Urar* and *Nattar* in local power structures

♦ explain the *Jajmani* and *Balutedar* systems in rural economies

♦ evaluate the impact of Saint poets and Sufis on social reform

♦ discuss the role of Bhakti ideology in challenging caste hierarchies

Background

To understand the dynamics of village communities and power structures in India, it is essential to examine a pivotal historical event: the Indian Peasant Uprisings of the late 19th and early 20th centuries. These uprisings were not isolated incidents but part of a larger pattern of resistance against exploitative agrarian practices, colonial land policies and the local power holders who enforced these practices. Figures such as Deshmukh, Chaudhari and Muqaddam played significant roles in this scenario, acting as intermediaries between the rural masses and the colonial or princely authorities. Understanding these figures and their influence in village society provides a lens through which we can analyse the power dynamics that shaped rural India.

Keywords

Deshmukh, Chaudhari, Muqaddam, Urar, Nattar, Jajmani, Balutedar, Sufism, *Bhakti*, Village Administration

Discussion

3.3.1 *Deshmukh, Chaudhari and Muqaddam*

3.3.1.1 The Role of *Deshmukh* in Village Communities

Deshmukh was a significant local chieftain or landlord in the medieval and colonial periods, particularly in the regions of Maharashtra and the Deccan. This title was often hereditary, passed down through generations, allowing the family to maintain control over vast lands and influence village administration. Historically, the role of the *Deshmukh* extended to tax collection, judicial authority and maintaining social order. The British colonial administration relied on these local elites to stabilise rural areas and ensure the efficient collection of revenue, which often led to the reinforcement of their power and status.

▶ *Deshmukh hereditary title*

Deshmukh's authority was not only economic but also socio-cultural. They wielded considerable influence over the cultural and social norms of the villages under their control. They were patrons of local festivals and religious events and had a say in the resolution of disputes among villagers. A.R. Kulkarni's research highlights that the *Deshmukh's* position was embedded in the socio-political fabric of rural India, making them indispensable to both the villagers and the colonial rulers.

▶ *Role of Deshmukh and their socio- cultural influence*

The *Deshmukh's* influence in the Deccan region extended well beyond the economic realm. They were pivotal in maintaining social hierarchies and upholding the values of the dominant castes. Historically, the *Deshmukh* wielded power not only through their direct control over agricultural lands but also through their involvement in local politics and their ability to mobilise village resources during conflicts. This position of power was often used to consolidate their influence over the agrarian community, ensuring that landless labourers and lower-caste workers remained dependent on their patronage.

▶ *Involvement in local politics*

During the Maratha period, the *Deshmukh* also played a significant role in the military, organising village defences against invasions and ensuring the safety of their regions. They were responsible for collecting and managing the *Chauth* (a form of tax imposed on the conquered regions), which further solidified their financial and political status. The British colonial administrators later adapted this system to facilitate revenue collection, thereby institutionalising the power of the *Deshmukh* as an intermediary between the state and the rural populace. This adaptation made

▶ *Institutionalising Deshmukh's power*

them essential to the British strategy of indirect rule, ensuring stability in the villages while minimising administrative costs.

Theoretical perspectives like *Antonio Gramsci's* concept of *hegemony* can be applied to understand *Deshmukh's* role in rural society. By exercising not just economic but also cultural and ideological dominance, the *Deshmukh* could maintain control over the peasantry. This form of power, which integrates coercion with consent, ensured that the socio-political order remained relatively uncontested despite its exploitative nature.

▶ *Control over the peasantry*

3.3.1.2 Influence of *Chaudhari* in the Agrarian Power Structure

The term *Chaudhari* was used primarily in North India to denote a local leader or chief responsible for managing the affairs of a village or a cluster of villages. *Chaudhari's* influence extended into land administration, dispute resolution and functioning as the intermediary between the rural population and the higher echelons of the colonial administration. They often played a dual role, acting as both the protector of the villagers' interests and as agents of the colonial state. This duality frequently led to conflicts of interest, where the *Chaudhari* was seen as both an oppressor and a negotiator for the peasants.

▶ *Role of Chaudhari*

Mridula Mukherjee discusses the *Chaudhari's* role in fostering a structured hierarchy within rural communities, often ensuring that the benefits of colonial policies favoured the upper castes and landed elites. *Chaudhari's* influence was instrumental in the spread of agricultural innovations and the commercialisation of agriculture, which had significant socio-economic implications for the rural peasantry. This role cemented their status as key figures in maintaining the agrarian power structure and reinforcing social stratification.

▶ *Socio economic impact*

Chaudhari was not just an administrator but also a symbol of local leadership that navigated between traditional norms and colonial demands. Their power was often legitimised through lineage and patron-client relationships that bound the lower castes to their service. These ties were both economic, through land tenure and revenue arrangements and socio-cultural, through patronage in religious and cultural events. The *Chaudhari's* ability to mediate disputes and their deep involvement in agrarian networks made them indispensable in maintaining rural stability.

▶ *Maintenance of meal stability*

One of the critical factors in the *Chaudhari's* influence was their role in the agrarian economy, which was undergoing significant changes during the colonial era. The introduction of commercial

► *Role in agrarian economy*

crops like indigo, cotton and opium altered traditional farming practices, leading to increased exploitation of small farmers and tenants. The *Chaudhari* often acted as agents for British interests, facilitating the transition towards a more commercialised agricultural economy that primarily benefitted the colonial state and the local elite.

► *Perpetuating economic dependencies*

In the broader theoretical context, the *dependency theory* provides insights into how the *Chaudhari*, along with other local elites, played a role in perpetuating economic dependencies between the rural communities and the colonial power structure. They acted as local nodes in a global economic system that extracted resources from rural India for the benefit of the colonial economy, reinforcing patterns of underdevelopment and social inequality.

3.3.1.3 The Role of *Muqaddam* in Village Leadership

► *Responsibilities*

The *Muqaddam* or village headman was a crucial figure in the administrative setup of rural India, especially during the Mughal era and later under British rule. The *Muqaddam's* responsibilities included overseeing agricultural production, collecting taxes, maintaining law and order and serving as a link between the villagers and the regional authorities. This position was often hereditary, passing from one generation to another, ensuring continuity in local governance.

► *Conflict resolution*

Peter Mayer's analysis of the Muqaddam's role emphasises their strategic importance in the village economy and their function as the implementers of agrarian policies designed by higher authorities. The Muqaddam's ability to mediate conflicts, manage community resources and uphold traditional customs was central to their leadership. They acted as enforcers of social norms, sometimes aligning with the interests of the dominant castes to suppress dissent within the village community.

► *Intermediary role*

The *Muqaddam's* position in village governance was multifaceted, involving both administrative and social responsibilities. They were often the point of contact for implementing state policies at the village level, such as tax collection, land surveys and census operations. This made them crucial intermediaries in the colonial administration's attempts to regulate and control rural society. The Muqaddam also played a significant role in conflict resolution, using their authority to settle disputes over land and resources, which were common in agrarian communities.

A fascinating aspect of the Muqaddam's role was their ability to balance traditional roles with emerging administrative demands.

Under British rule, the introduction of new legal and revenue systems transformed the village economy, but the Muqaddam often resisted these changes to protect the interests of the local population. They employed strategies of negotiation and selective compliance, which can be understood through James Scott's concept of *everyday forms of resistance*. This resistance was subtle, taking the form of delaying tactics, misinformation and selective interpretation of laws to benefit their communities.

3.3.2 *Urar* and *Nattar*

3.3.2.1 Understanding *Urar* in the Social Hierarchy

The *Urar* were a distinct group of village leaders or elders in Tamil Nadu, often involved in the management of communal resources, decision-making in village affairs and the enforcement of customary laws. Their authority was derived not only from their socio-economic status but also from their role as custodians of local traditions and practices. The *Urar* were responsible for organising community labour for agricultural work and ensuring that village rituals and festivals were conducted following tradition.

In the socio-political hierarchy of South India, the *Urar*'s role was comparable to that of the Nattar, with both groups holding considerable sway in their respective communities. Their influence extended to areas such as dispute resolution, allocation of land and the supervision of village artisans and craftsmen. Their decisions were often binding, with a focus on maintaining the social equilibrium within the village, reflecting the deeply entrenched caste-based hierarchy of the time.

The role of the *Urar* in Tamil Nadu's village communities was deeply intertwined with the socio-political and economic fabric of the region. These leaders were often associated with the *Vellala* caste, who held significant power in the agrarian structure. The *Urar*'s control over village resources, especially water bodies essential for agriculture, placed them in a strategic position to dictate the economic activities of the village. They organised the labour for irrigation projects, which were vital in a region dependent on monsoon and river-fed agriculture.

The *Urar*'s influence also extended to the administration of village temples, which were not just religious centres but also hubs of economic and social activity. These temples often owned large tracts of land and employed numerous people and the *Urar*'s role in managing these assets gave them substantial leverage in village politics. This control over both spiritual and material resources

Everyday resistance

Urar- community leaders

Caste-based hierarchy

Urar in Tamil Nadu
Vellala caste

Cultural hegemony

reflects a form of *cultural hegemony*, where the *Urar* reinforced their socio-political dominance through religious institutions.

3.3.2.2 The *Nattar* and their Influence on Local Governance

Nattar, often referred to as the assembly of influential men in the village, played a pivotal role in the governance structure of rural communities in South India. They were the arbiters of local disputes, the overseers of communal work and the defenders of traditional practices. Their authority was based on their landholding status and their lineage, which gave them the legitimacy to govern the village's social and economic affairs.

▶ *Nattar and local governance*

The Nattar's decisions were deeply influenced by the need to uphold caste norms and to preserve the socio-economic status quo. This often meant that their governance practices were exclusionary, favouring the higher castes and marginalising the lower castes. The Nattar's role in regulating access to resources, land and opportunities was a reflection of the rigid caste system that dominated rural society in pre-colonial and colonial South India.

▶ *Caste norms and socio-economic exclusion*

The *Nattar* played a critical role in maintaining the socio-political order in Tamil Nadu's rural landscape. They were often involved in legal matters, acting as judges in local disputes and arbitrating conflicts related to land, marriage and trade. Their decisions were typically based on customary laws and were enforced through social sanctions, which included community ostracism or denial of access to communal resources.

▶ *Maintenance of socio- political order*

The Nattar's governance strategies were closely tied to the principles of caste-based hierarchy. They ensured that the power dynamics within the village remained favourable to the dominant castes while systematically marginalising the lower castes. This perpetuation of caste-based discrimination can be analysed through the lens of *social stratification theories*, which emphasise how power and privilege are maintained in hierarchical societies through control over resources and social norms.

▶ *Governance strategies*

A historical example of the Nattar's influence can be seen in their role during the *Panchayat system* of South India, where they acted as de facto leaders, even though the official role of the Panchayat was supposed to represent all castes equally. This underscores the gap between formal political structures and the actual practices of power, where the dominant castes, represented by the Nattar, continued to exert disproportionate influence over local governance.

▶ *Role in Panchayat system*

3.3.3: *Jajmani* and *Balutedar* System

3.3.3.1 The *Jajmani* System: Structure and Functionality

▶ *Caste-based barter*

The *Jajmani system* was a socio-economic system in rural India that governed the relationship between various castes based on hereditary occupation and service obligations. It was essentially a barter system where lower caste groups provided specific services to the upper castes in exchange for agricultural produce or other forms of compensation. This system created a network of interdependencies that were crucial for the functioning of village life.

▶ *Colonial formalisation and social order*

Peter Mayer's research indicates that the formalisation of the Jajmani system occurred during the colonial period as part of a strategy to stabilise and control agrarian production. The British colonial rulers saw the Jajmani system as a mechanism to streamline tax collection and maintain social order, which further entrenched the caste-based divisions in society. Despite its exploitative nature, the system was often romanticised as an example of village self-sufficiency and cooperation .

▶ *Principle of reciprocity*

The *Jajmani system* was more than a mere economic arrangement; it was a mechanism that enforced the social hierarchy through economic interdependencies. The system functioned on the principle of *reciprocity*, where lower-caste service providers were bound to serve the upper-caste patrons in exchange for agricultural produce or other goods. However, this reciprocity was inherently unequal, as it reinforced the dominance of the higher castes by keeping the lower castes economically dependent.

▶ *Colonial codification*

Peter Mayer's study on the origins of the Jajmani system suggests that its institutionalisation in the late 19th century was not entirely organic but was shaped by the needs of the colonial administration to manage rural labour and stabilise agrarian output. The British codified these traditional relationships to ensure a steady flow of resources and services, which were critical to the colonial economy. This codification also led to the solidification of caste identities, as the Jajmani roles became more rigidly defined and less flexible over time.

▶ *Mechanical solidarity*

From a sociological perspective, the Jajmani system can be analysed through *Emile Durkheim's* theory of *mechanical solidarity*, where social cohesion in traditional societies is based on the interdependence of its members within a stratified social order. In this context, the Jajmani system acted as the glue that held village society together, even as it perpetuated inequality and social exclusion.

3.3.3.2 The *Balutedar* System: A Parallel Economy

The *Balutedar system* was a traditional occupational structure in Maharashtra, where specific groups of artisans and labourers (known as Balutedars) were obligated to provide services to the village community. These services were tied to their caste and were often hereditary. The Balutedars included a range of professions such as blacksmiths, potters, carpenters and barbers, whose work was essential to the village economy.

A.R. Kulkarni's analysis of the Balutedar system highlights its role in sustaining the economic and social fabric of rural Maharashtra. Unlike the Jajmani system, which was predominantly service-oriented, the Balutedar system also involved the production of goods that were vital to agricultural and domestic life. This system reinforced the caste hierarchy by restricting occupational mobility and ensuring that each caste group remained within its traditional role.

The *Balutedar system* was instrumental in shaping the socio-economic landscape of Maharashtra's villages. It included a network of service providers who performed essential functions, such as blacksmithing, pottery, carpentry and barbering. These roles were hereditary, with each family expected to continue in their traditional occupation, ensuring a stable yet hierarchical division of labour.

A.R. Kulkarni's analysis emphasises the *economic functionality* of the Balutedar system, where each service was essential to the agrarian economy. Unlike the market-based exchanges of modern economies, the Baluted system operated on a principle of *non-monetary exchange* and community-oriented service, ensuring that each member of the village economy played a specific role in maintaining the stability and productivity of the community. This arrangement not only created a form of economic interdependence but also enforced social control by tying individuals to their caste-based occupations.

Balutedar System's Socio-Economic Impact

The *Balutedar system* did not merely function as an economic framework but also reinforced the rigid caste hierarchies within the village society. The system included twelve primary service providers, or "Balutedars," and each was tied to their specific occupation: blacksmiths (Lohar), carpenters (Sutar), barbers (Nai), potters (Kumbhar) and others. This division of labour was strictly maintained through social norms that discouraged occupational mobility.

Sidebar (margin notes):
- *Hereditary occupations*
- *Economic sustainability*
- *Hierarchical labour division*
- *Kulkarni's analysis*
- *Reinforcement of rigid caste hierarchy*

An important aspect of the Balutedar system was the concept of *Watan* — hereditary land grants provided to these service providers as a form of compensation for their labour. This land was not purely economic capital but also a symbol of the social standing and the obligations of the Balutedars to their patrons. The Watan system ensured that the lower castes, while economically dependent, were also tied to the local power structure, where they were both beneficiaries and subjects of control.

► *Concept of watan*

Theoretical Perspectives on Balutedar and Social Control

From a theoretical perspective, the Balutedar system can be analysed through the lens of *Karl Marx's* concept of *social relations of production*. According to Marx, the structure of economic systems in a society fundamentally shapes its class relations. In the Balutedar system, the hereditary nature of occupations and the control of resources by the dominant castes created a form of *economic subjugation* where the lower castes remained bound to their roles without the possibility of upward mobility.

► *Marxist perspective*

This socio-economic arrangement also aligns with *Weberian sociology*, particularly Weber's idea of *status groups*. The Balutedar system emphasised a social order where one's status and privileges were derived not only from economic assets but also from their place within the traditional hierarchy. This status was perpetuated by the control of access to essential resources like land and the economic dependency it created among the lower castes.

► *Aligns with Weberian sociology*

The Decline of the Balutedar System During Colonial Rule

A case study of the decline of the Balutedar system in Maharashtra during British colonial rule reveals the impact of changing economic policies and the introduction of a cash-based economy. The British land revenue policies, which promoted individual land ownership and commercialisation of agriculture, weakened the traditional non-monetary exchanges that defined the Balutedar system. The introduction of market dynamics and the commodification of labour reduced the dependence on hereditary services, leading to the gradual erosion of this system.

► *Decline under colonialism*

The shift from a barter-based economy to a cash-based one also led to the fragmentation of the social fabric in village communities. Many Balutedars were forced to abandon their traditional occupations and migrate to urban areas in search of better opportunities, which marked a significant socio-economic

► *Disintegration of the patron-client relations*

transformation. This change also led to the disintegration of the patron-client relationship that had been the backbone of the village economy for centuries.

3.3.4. Dissent Culture: Saint Poets, Sufis and Bhakti Ideology

3.3.4.1 Saint Poets as Agents of Social Change

▶ *Counter narrative to caste based social structure*

The tradition of *Saint poets* in India, like Kabir, Ravidas and Tukaram, emerged as a powerful counter-narrative to the prevailing caste-based social structure. These poets used their verses to critique societal norms, question the legitimacy of the caste system and promote the idea of a universal spiritual truth that transcended religious and social divisions. Raj Kumar Hans discusses how these poets, particularly those from marginalised communities, expressed their dissent through devotional poetry, which resonated with the lower castes and inspired movements for social reform.

▶ *Departure from the orthodox religious practices*

These saint poets were often aligned with the *Bhakti* movement, which rejected ritualistic practices and emphasised a direct, personal connection with the divine. Their teachings encouraged the idea that true devotion lay in equality and love for all beings, irrespective of caste or creed. This was a radical departure from the orthodox religious practices of the time, which were deeply entrenched in caste discrimination.

▶ *Powerful social reformers*

The *Saint poets* of India were more than just spiritual figures; they were powerful social reformers who used their poetic expression to challenge the deeply ingrained caste-based discrimination and social inequalities. Figures like Kabir, Ravidas and Sant Tukaram critiqued the religious orthodoxy of their times, directly confronting the practices that perpetuated caste hierarchies and social exclusion.

▶ *Vision of spirituality*

Raj Kumar Hans emphasises that these poets, many of whom belonged to marginalised communities themselves, articulated a vision of spirituality that transcended religious boundaries and directly opposed the caste-based social order. Their poetry was not just a call for spiritual awakening but also a radical critique of the socio-political structures that oppressed the lower castes. For example, Kabir's verses attacked both Hindu and Muslim orthodoxies, calling for a return to a universal and direct connection with the divine, free from the mediation of priests and religious authorities.

Bhakti Movement's Influence on Social Equality

The *Bhakti movement*, which was closely linked with the teachings of these Saint poets, played a crucial role in the cultural

transformation of Indian society. The movement emphasised *devotion (Bhakti)* as the highest form of religious expression, which was accessible to everyone regardless of caste, creed, or gender. This egalitarian approach was revolutionary in a society dominated by rigid social hierarchies.

► *Cultural transformation*

The *Bhakti* ideology propagated by these poets challenged the existing norms by advocating for the equality of all human beings before God. This philosophical stance not only resonated with the oppressed classes but also provided a platform for social mobility. For instance, Ravidas, a saint poet from the leather-working Chamar caste, used his hymns to preach against untouchability and asserted the spiritual worth of every individual.

► *Challenging existing norms*

From a theoretical perspective, the *Bhakti* movement can be viewed through the framework of *liberation theology*, which emphasises the role of religion in advocating for social justice and equality. This perspective argues that spiritual movements often serve as catalysts for socio-political change, particularly in contexts where institutionalised religion supports social inequality.

► *Liberation theology*

3.3.4.2 The Role of Sufis in Promoting Social Harmony

Sufi saints played a critical role in spreading a message of inclusivity and compassion, which was in stark contrast to the rigid caste-based hierarchies that dominated Indian society. Their philosophy emphasised inner spirituality over external rituals, fostering a culture of tolerance and understanding among diverse communities. The Sufi mystics used poetry, music and dance as mediums to express their devotion, making their teachings accessible to the masses.

► *Sufi saints and their philosophy*

Sufi shrines became centres of social and cultural interaction, where people from different faiths and backgrounds could come together. This syncretic approach helped bridge the gap between Hindus and Muslims, promoting a shared sense of community. The impact of Sufi teachings on Indian society can be seen in the way they influenced local traditions and folk practices, creating a cultural tapestry that was both diverse and united.

► *Inclusivity*
► *Syncretic tradition*

Sufism in India emerged as a significant spiritual and socio-cultural force that sought to bridge the divides between different religious communities. Sufi saints like *Khwaja Moinuddin Chishti* and *Hazrat Nizamuddin Auliya* promoted values of compassion, humility and inclusivity, drawing followers from various castes and religions. Their teachings emphasised the inner journey towards divine love, transcending the materialistic and divisive practices upheld by orthodox religious authorities.

► *Spiritual and socio cultural force*

Dargahs

Sufi shrines, known as *Dargahs*, became spaces where people from diverse backgrounds could come together to seek spiritual solace. These gatherings fostered a sense of communal harmony and cultural synthesis, which played a crucial role in mitigating caste-based discrimination. Sufi practices often included music and poetry, such as *Qawwalis*, which conveyed messages of divine love and unity, reinforcing the idea that all humans were equal in the eyes of the divine.

Communitas

In sociological terms, Sufism's emphasis on *universalism* can be related to *Victor Turner's* concept of *communitas* — a spirit of community that emerges during rituals or gatherings that transcends social hierarchies and fosters a collective identity. This notion of *communitas* was central to the Sufi gatherings, where the barriers of caste, class and religion were dissolved in the pursuit of spiritual experiences.

Sufi-Bhakti Synthesis: A Cultural Confluence

The synthesis between the *Bhakti* and *Sufi* traditions in India led to the development of a rich cultural milieu that promoted ideas of love, equality and devotion. The confluence of these two movements is evident in the works of poets like Kabir and later on in the poetry of *Bulleh Shah*, who seamlessly integrated elements of both traditions in their verses.

Universalism

Cultural syncretism

This blending of Sufi and *Bhakti* elements created a unique spiritual landscape that not only defied orthodox religious boundaries but also laid the groundwork for a more inclusive cultural identity in India. It challenged the Brahminical dominance and advocated for a society where spiritual merit, not caste, defined one's worth. This legacy of cultural syncretism continues to influence Indian society today, as it provides a counter-narrative to divisive ideologies.

3.3.4.3 *Bhakti* Ideology as a Catalyst for Reform

The *Bhakti movement* was a socio-religious movement that challenged the orthodox practices of Hinduism and sought to bring about social change through devotion and personal spirituality. It was characterised by its opposition to ritualism, caste discrimination and the dominance of the Brahminical order. The *Bhakti* saints advocated for a form of worship that was open to all, regardless of caste, gender, or social status.

Challenged the orthodox practices of Hinduism

Spiritual inclusivity

The *Bhakti* ideology played a crucial role in empowering the lower castes, providing them with a platform to voice their grievances and assert their dignity. It acted as a unifying force that brought together diverse groups under a common spiritual umbrella, emphasizing

the values of love, compassion and humility. This movement laid the groundwork for later social and political reforms, influencing the trajectory of Indian society towards greater inclusivity.

▶ *Bhakti saints*

The *Bhakti movement* fundamentally altered the socio-religious dynamics of Indian society by providing a voice to those who were otherwise marginalised by the caste system. The *Bhakti* saints, such as *Mirabai*, *Tulsidas* and *Dnyaneshwar*, focused on a personal, devotional relationship with God that did not require intermediaries like priests or adherence to ritualistic practices.

▶ *Importance to women and the lower castes*

This movement was particularly significant for women and the lower castes, who found in *Bhakti* a space for spiritual and social expression. Mirabai, a Rajput princess turned saint, openly defied the norms of her aristocratic background by expressing her love for Krishna through poetry and song, breaking societal expectations regarding gender roles and caste boundaries.

▶ *Emphasis on Nirguna Bhakti*

The *egalitarian ethos* of the *Bhakti* movement also provided a framework for critiquing the socio-economic inequalities perpetuated by the caste system. The emphasis on *Nirguna Bhakti* — devotion to a formless divine — symbolised a rejection of the rigid caste distinctions, as it suggested that the divine could not be confined to human-made categories.

▶ *Nirguna Bhakti and post-colonial critique*

From a theoretical viewpoint, the *Bhakti* movement's challenge to the socio-religious order can be linked to the *post-colonial* critique of *hegemonic cultural practices*. It questioned the dominance of Brahminical ideologies and offered an alternative narrative that valorised the spiritual experiences of marginalised communities.

Summarised Overview

This Unit focuses on the power structures within village communities and the various roles that shaped local governance and social hierarchies. It examines the functions of figures like *Deshmukh, Chaudhari* and *Muqaddam*, who acted as intermediaries between villagers and higher authorities, often reinforcing caste-based power dynamics. The unit explores the roles of *Urar* and *Nattar* in South Indian contexts, highlighting their influence on community decision-making and resource allocation. It delves into economic systems like *Jajmani* and *Balutedar*, which govern occupational relationships and services within villages, often along caste lines. The unit also examines dissent cultures, particularly the influence of Saint poets, Sufis and the Bhakti movement in challenging orthodox social structures and promoting ideas of equality and spiritual inclusivity. It discusses how these

movements provided platforms for marginalised groups to express their grievances and assert their dignity. The unit emphasises the complex interplay between traditional power structures and reformist ideologies, showing how spiritual movements often served as catalysts for social change. It concludes by examining the lasting impact of these historical systems and movements on modern Indian society, highlighting both the persistence of traditional power dynamics and the ongoing struggle for social equality and reform.

Assignments

1. Compare the roles of Deshmukh and Chaudhari in village administration.
2. How did the *Jajmani* system reinforce caste-based occupational divisions?
3. Analyse the impact of the *Balutedar* system on rural economic relations.
4. Evaluate the contribution of Saint poets to social reform movements.
5. Discuss the role of Sufism in promoting intercommunal harmony in India.
6. How did Bhakti ideology challenge traditional caste hierarchies?

Suggested Reading

1. Chakravarti, Uma. *Everyday Lives, Everyday Histories: Beyond the Kings and Brahmanas in Ancient India*. Tulika Books, 2006.
2. Malik, S. C., editor. *Indian Movements: Some Aspects of Dissent, Protest and Reform*. Indian Institute of Advanced Studies, 1978.
3. Stein, Burton. *Peasant State and Society in Medieval South India*. Oxford University Press, 1980.

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1. Kulkarni, A. R., The Indian Village with Special Reference to Medieval Deccan (Maratha Country): General Presidential Address. *Proceedings of the Indian History Congress*, *52*, 1991. http://www.jstor.org/stable/44142566
2. Mukherjee, M., Peasant Resistance and Peasant Consciousness in Colonial India: "Subalterns" and Beyond. *Economic and Political Weekly*, *23*(41), 1988. http://www.jstor.org/stable/4379152

3. Mayer, Peter, Inventing Village Tradition: The late 19th Century Origins of the North Indian 'Jajmani System'. *Modem Asian Studies,* 27, 2 (1993), 1993. 10.1017/S0026749X00011537

4. Hans, R. K., Devotion and Dissent of Punjabi Dalit Sant Poets. In V. Ramaswamy (Ed.), *Devotion and Dissent in Indian History* (pp. 188–215). chapter, Foundation Books, 2014.

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.

Caste, Colonialism, Reform and Nationalism

BLOCK-04

UNIT 1

Caste, Exclusion and Struggles for Equality and Social Justice

Learning Outcomes

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

♦ analyse caste-based exclusion and its socio-political implications

♦ evaluate the contributions of anti-caste movements and key reformers

♦ understand the Adi-Hindu, Adi-Dravida and Namasudra movements

♦ explore the intersection of social justice and civil rights in India

♦ reflect on the relevance of equality struggles in contemporary contexts

Background

Indian society has been woven for centuries by traditions, religions and customs, but one of the most enduring and oppressive systems has been the caste system. This hierarchical division of society, deeply rooted in the Hindu religious order, structured individuals' lives based on birth, defining their occupations, social status and relationships with others. While those at the top of the caste hierarchy—the Brahmins and other upper castes—enjoyed privileges and social power, those at the bottom, particularly the Dalits (formerly called "untouchables"), were subjected to extreme discrimination, oppression and exclusion.

However, the caste history in India is also a history of resistance. From the earliest days of colonial rule to post-independence India, courageous individuals and collective movements have challenged this system of inequality. The anti-caste movements, driven by a vision of social equality and justice, have been vital in confronting entrenched social hierarchies and demanding civil rights for marginalised communities. Understanding the struggles of these movements allows us to appreciate not only the history of Dalit liberation but also the broader fight for human rights, dignity and justice in India. Prominent figures such as Jyotiba Phule, Periyar E.V. Ramasamy, Ayyankali and Poyikayil Appachchan were at the forefront of this fight and their efforts laid the groundwork for the larger Indian civil rights and social justice movements.

Discussion

4.1.1. Historical Emergence of the Caste System

The origins of the caste system in India can be traced back to ancient religious and social structures, specifically the *Rig Veda*, one of the oldest Indian texts. The *Rig Veda* contains the Purusha Sukta hymn, which describes the cosmic being (*Purusha*) from whose body the four primary *varnas* (Brahmins, *Kshatriyas*, *Vaishyas* and *Shudras*) were created. This early religious articulation of social stratification laid the groundwork for what would evolve into the caste system, a highly rigid and hierarchical structure. In this framework, Brahmins, emerging from Purusha's mouth, were associated with priesthood and knowledge, *Kshatriyas* from his arms were warriors and rulers, *Vaishyas* from his thighs were traders and agriculturists and Shudras from his feet was relegated to servile labour. However, this early system was fluid and based on function rather than birth. Over time, this flexibility diminished as caste became a rigid hereditary system.

The *Manusmriti*, composed around the second century BCE, played a crucial role in this transformation. It codified the caste system into a legal and social framework that linked one's birth to their social status and profession. Ambedkar, one of the foremost critics of the caste system, highlighted the *Manusmriti*'s role in solidifying caste-based oppression. He critiqued it as a "gospel of social inequality," which institutionalised a system where those born into lower castes were destined for perpetual subjugation. According to Ambedkar, the caste system was not a mere division of labour but a division of labourers, designed to perpetuate the dominance of the Brahmins over the lower castes. He argued that this system of "graded inequality" created a deeply entrenched hierarchy that dehumanised the lower castes, especially the Dalits, who were considered impure and excluded from all aspects of social, economic and political life.

Ambedkar's analysis of the caste system revealed its inherent contradiction with the values of liberty, equality and fraternity. He believed that caste, in its essence, was a "monster" that destroyed

▶ Early varna roles were function-based

▶ Manusmriti codified caste as hereditary
▶ Ambedkar exposed caste-based oppression

any notion of social justice. The Brahminical order, Ambedkar contended, was not just a religious or philosophical framework but a political tool designed to maintain the privileges of the upper castes by ensuring the economic and social servitude of the lower castes. The system's rigidity ensured that upward social mobility was nearly impossible for those at the bottom of the hierarchy, particularly the Shudras and Dalits. In his work Annihilation of Caste, Ambedkar described the caste system as "a system of social stratification that stigmatises people based on birth, condemns them to perpetual inferiority and denies them basic human rights."

Caste contradicted liberty and equality

Caste, thus, became a fundamental mechanism of social exclusion. The control of the upper castes, especially the Brahmins, over religious texts and rituals further entrenched their dominance. Over centuries, this system evolved into a deeply ingrained social order that justified the marginalisation and exploitation of lower castes. It was not simply a neutral societal arrangement but an oppressive structure designed to preserve the power and status of a select few. The rigidity and hereditary nature of caste transformed what may have begun as a division of labour into a system of exclusion and exploitation, making it one of the most enduring forms of social oppression in human history.

Caste entrenched social exclusion

4.1.2. Defining Social Exclusion in India

Social exclusion in India is deeply intertwined with the caste system, which has historically dictated an individual's social, economic and political status. The caste-based social order created barriers that excluded lower castes, particularly the Dalits, from basic human rights and resources. This exclusion was not just social but structural, embedded in every aspect of life, including access to education, employment, public spaces and religious practices. Dalits were relegated to the most degrading occupations, such as manual scavenging and other forms of servile labour, which were considered impure by the upper castes. This systemic exclusion led to what Ambedkar referred to as a form of "social slavery," where Dalits were denied even the most basic dignities of life.

Structural exclusion embedded in daily life

The exclusion was not limited to informal social practices but was reinforced through religious and legal systems. Hindu religious texts, such as the *Manusmriti*, codified this exclusion by prescribing severe restrictions on the behaviour, occupation and rights of lower-caste individuals. For example, Dalits were forbidden from accessing public wells, temples, or schools and were forced to live on the outskirts of villages, segregated from the rest of society. This spatial, economic and social exclusion was justified by religious doctrines that labelled them as "untouchables." Ambedkar's life

Ambedkar's experiences inspired his activism

and work were deeply shaped by these experiences of exclusion. Born into a Dalit family, Ambedkar was acutely aware of the dehumanising impact of caste-based discrimination. He frequently recounted how, as a child, he was forced to sit outside the classroom and drink water from a distance, as his touch was considered polluting. These personal experiences of exclusion became the foundation for his lifelong struggle against caste-based oppression.

Caste exclusion denied Dalits' rights

Ambedkar argued that untouchability was not merely a social issue but a political one. He believed that caste-based exclusion was a form of political disenfranchisement that denied Dalits their civil and human rights. According to Ambedkar, "Caste is a state of mind. It is a disease of the mind. It is a form of mental slavery." This slavery, he argued, was perpetuated not only through religious practices but also through the institutions of the state, which failed to protect the rights of lower castes. The exclusion of Dalits was a result of a deliberate social order that was designed to maintain the economic and political dominance of the upper castes.

Caste-based violence and segregation persist

While the Indian Constitution, drafted under Ambedkar's leadership, outlawed untouchability and provided safeguards for Dalits through affirmative action policies, the reality on the ground remains starkly different. Caste-based violence, discrimination and segregation continue to persist, particularly in rural areas where traditional hierarchies remain deeply entrenched. Despite constitutional provisions and legal protections, Dalits continue to face exclusion in education, employment and public life. The persistence of manual scavenging, despite its legal prohibition, is a testament to the deep-seated nature of caste-based exclusion in India.

Caste exclusion persists in urban areas

Rural hierarchies enforce economic oppression

In both urban and rural contexts, social exclusion based on caste has evolved but remains a significant barrier to equality. In cities, while there is greater anonymity and mobility, caste still plays a role in determining access to jobs, housing and social networks. In rural India, where caste hierarchies are more visible and rigid, Dalits are often denied access to land, water and other critical resources. The exclusion is not only social but deeply economic, as Dalits remain disproportionately represented in the most marginalised and underpaid sectors of the economy. This form of exclusion has perpetuated cycles of poverty and social marginalisation that are difficult to break. Ambedkar's assertion that "a caste is an enclosed class" continues to hold relevance in contemporary India, where caste remains a powerful determinant of one's social and economic opportunities.

4.1.3 Anti Caste Movements and Struggles for Equality

4.1.3.1 Struggles for Equality

Struggles for equality and social justice have been a fundamental part of human history, particularly in societies structured by rigid hierarchies. In India, the fight against caste-based discrimination and social exclusion has formed the core of these struggles. The caste system, with its deep-rooted socio-religious basis, created an unjust social order where entire communities were denied access to resources, education and basic human dignity. These struggles for equality aimed to dismantle this oppressive system and ensure that every individual, regardless of caste, class, or gender, could enjoy the rights and freedoms promised by the Indian Constitution.

The broader movements for social justice in India have been shaped by diverse ideologies and approaches, from constitutional reforms to grassroots activism. They have been driven by both individual and collective efforts, aiming to address not only caste-based exclusion but also other forms of inequality related to gender, religion and economic status. The leaders of these movements, such as Jyotirao Phule, Periyar E.V. Ramasamy and B.R. Ambedkar, among others, have played a pivotal role in shaping the discourse around social justice, arguing for systemic changes that would ensure equality for all.

4.1.3.2 Jyotirao Phule and the Satyashodhak Movement

Jyotirao Phule was a pioneering figure in the Indian social reform movement and his work laid the foundation for subsequent anti-caste movements. Born in 1827 into a lower-caste Mali (gardener) family, Phule was acutely aware of the social and economic marginalisation experienced by those at the bottom of the caste hierarchy. His personal experiences of discrimination, coupled with his exposure to Western ideas of equality and justice during his education, shaped his ideological framework. Phule's response to the entrenched system of caste-based oppression was revolutionary for his time, particularly in its focus on the intersectionality of caste, gender and economic exploitation.

In 1873, Phule founded the Satyashodhak Samaj (Society of Truth Seekers), a social reform organisation aimed at emancipating the lower castes from the dominance of the Brahminical social order. The Samaj was primarily concerned with opposing the social and religious customs that sustained caste-based oppression, particularly the monopoly of Brahmins over religious and

Aim: equality irrespective of caste or gender

Movements shaped by diverse ideologies

Phule's work initiated anti- caste movements

Satyashodhak Samaj opposed Brahmin dominance

educational institutions. Phule's critique was not just of the caste system but also of the broader framework of Hinduism, which he believed perpetuate social inequality through religious texts and practices.

Phule's Critique of Religious Orthodoxy and Brahmanical Hegemony

Phule's criticism of the caste system was deeply rooted in his critique of religious orthodoxy. He believed that Hindu scriptures, particularly the *Manusmriti*, were instrumental in legitimising the hierarchical social order that subjugated the lower castes. According to Phule, the Brahmins had constructed a religious and social framework that maintained their dominance by controlling access to knowledge, resources and religious power. Phule famously declared that the Brahmins had appropriated knowledge and distorted religious texts to serve their interests, thereby consolidating their social and economic power at the expense of the lower castes.

▶ *Phule opposed caste-based religious orthodoxy*

Phule's attack on Brahmanical dominance was particularly focused on the *Manusmriti*, which he regarded as a tool for maintaining caste-based inequality. Phule argued that the *Manusmriti*'s prescriptions for social order—particularly its justification for the degradation of the Shudras and untouchables—were responsible for centuries of oppression. He likened the caste system to slavery, drawing parallels between the conditions of the lower castes in India and the African slaves in America. His work *Gulamgiri* (Slavery), published in 1873, was dedicated to the African-American abolitionists, highlighting Phule's internationalist approach to issues of social justice.

▶ *Manusmriti upheld caste-based oppression*

Education as a Tool for Social Emancipation

One of the central pillars of Phule's reform agenda was education, which he viewed as the most effective tool for social emancipation. He believed that education could empower the lower castes to challenge the religious and social structures that upheld their oppression. Phule's emphasis on education was not limited to men; he was one of the first social reformers in India to advocate for female education, particularly for girls from lower-caste backgrounds. In 1848, he established the first school for girls in Pune, which marked a significant step in the fight against the social norms that restricted women's access to education.

▶ *Education as key to social change*

Phule's educational reforms were not merely about literacy but also about social consciousness. He believed that the lower castes

Education aimed at social awakening

had internalised the values of the caste system and that education was the key to awakening them to the realities of their oppression. His schools were designed to challenge the religious doctrines that justified caste hierarchy, encouraging critical thinking and questioning of traditional authority. Phule's efforts to provide education to lower-caste children were met with strong opposition from the upper castes, particularly the Brahmins, who saw his work as a direct challenge to their authority.

Satyashodhak Samaj demanded lower-caste rights

Phule's focus on education extended beyond the classroom. He believed that social reform could not be achieved through formal education alone; it required a broader social movement that included mass mobilisation and political activism. His organisation, the Satyashodhak Samaj, played a crucial role in mobilising the lower castes to demand their rights, including access to education, land and political representation.

The Intersectionality of Caste and Gender

Caste and gender oppression intersected

Phule's work was also groundbreaking in its recognition of the intersectionality of caste and gender oppression. He argued that women, particularly those from lower-caste backgrounds, faced a double burden of discrimination—both as members of marginalised castes and as women in a patriarchal society. In Phule's view, the oppression of women was inextricably linked to the oppression of lower castes and both forms of discrimination needed to be addressed simultaneously.

Savitribai Phule advanced girls' education

Phule's wife, Savitribai Phule, played a significant role in advancing his educational reforms, particularly in promoting the education of girls. Together, they established schools for girls and organised campaigns to raise awareness about issues such as child marriage, widowhood and female infanticide. Phule's critique of the caste system extended to its impact on women's lives, particularly in terms of their restricted access to education and their subjugation within the family and community.

Phule inspired feminist and anti-caste movements

Phule's approach to social reform was thus holistic, addressing the structural inequalities that affected both caste and gender. His work laid the foundation for later feminist and anti-caste movements in India, particularly those that focused on the intersection of caste and gender oppression.

Several scholars have offered interpretations of Phule's work, emphasising different aspects of his contribution to social reform and his critique of caste and religious orthodoxy. Historian Rosalind O'Hanlon argues that Phule's critique of Brahmanical Hinduism was radical in its rejection of the religious legitimacy of

the caste system. According to O'Hanlon, Phule's work represents a "social revolution in thought," as he systematically dismantled the religious and philosophical justifications for caste-based inequality. O'Hanlon highlights how Phule's rejection of the Vedic tradition as the foundation of Hinduism set him apart from other social reformers of his time, many of whom sought to reform Hinduism from within rather than reject its religious authority altogether.

Political scientist Gail Omvedt has also written extensively on Phule's contribution to the anti-caste movement, emphasising his role as a precursor to B.R. Ambedkar. Omvedt points out that while Ambedkar is often seen as the leader of the modern Dalit movement, it was Phule who first articulated a coherent critique of caste and laid the groundwork for later anti-caste struggles. Omvedt highlights the anti-Brahminical nature of Phule's movement, arguing that Phule's challenge to Brahminical hegemony was not limited to social and religious criticism but also included a critique of economic exploitation and political disenfranchisement.

In addition, Eleanor Zelliot, a prominent scholar of the Dalit movement, has pointed out that Phule's emphasis on education as a means of empowerment was a revolutionary idea in 19th century India. According to Zelliot, Phule's focus on female education and the education of lower-caste children marked a radical departure from the prevailing social norms, which restricted access to education based on caste and gender. Zelliot also highlights the influence of Western liberal ideas on Phule's thought, particularly his commitment to equality and human rights.

Another scholar, Vijaya Gokhale, has examined Phule's critique of religion, arguing that his rejection of Brahminical Hinduism was not merely an intellectual exercise but a call for social action. Gokhale suggests that Phule's work represents a fusion of rationalism and activism, as he sought to dismantle the caste system through both intellectual critique and grassroots mobilisation. Gokhale also highlights Phule's internationalism, noting his admiration for Western abolitionist movements and his efforts to connect the struggle against caste oppression in India with global movements for social justice.

4.1.3.3 Swami Acchutanand: A Pioneer of the Adi-Hindu Movement

Swami Acchutanand, a pivotal figure in the Dalit movement in northern India, played a crucial role in challenging caste-based discrimination and advocating for the rights of Dalits. As a key leader of the Adi-Hindu movement, Acchutanand worked

tirelessly to uplift the Dalit community, particularly by promoting social and political mobilisation and advocating for the reclamation of Dalit identity. His leadership and activism laid the groundwork for the later efforts of Dr. B.R. Ambedkar and other Dalit leaders, positioning him as one of the early pioneers in the fight for social justice and equality in India.

The Adi-Hindu Movement and Dalit Identity

The Adi-Hindu movement emerged in the early 20th century as a direct response to the rigid caste system that had historically marginalised the Dalit community. The term "Adi-Hindu" itself was a bold assertion by Dalits, signifying that they were the original inhabitants of India and predated the Aryan invaders, who were believed to have imposed the caste system. This idea was revolutionary because it sought to reclaim the indigenous identity of Dalits, positioning them not as outsiders to the Hindu fold but as its original and rightful members. The movement represented a significant shift in how Dalits saw themselves with the broader Hindu society and its hierarchical structure.

Swami Acchutanand was one of the key figures to popularise this idea, using it to rally the Dalit community around a shared identity and history. By positioning the Adi-Hindus as the true inheritors of India's ancient civilization, Acchutanand challenged the Brahmanical narrative that had relegated Dalits to the lowest rungs of society. This reversal of the social hierarchy was not only a powerful symbolic gesture but also a tool for political mobilisation, as it gave Dalits a sense of dignity, self-worth and historical significance that had long been denied to them.

Swami Acchutanand's Advocacy for Social and Political Mobilisation

One of the central pillars of Acchutanand's leadership was his emphasis on social and political mobilisation. He believed that education, political representation and economic empowerment were key to breaking the cycle of oppression that had kept Dalits marginalised for centuries. Under his leadership, the Adi-Hindu movement organised mass protests, public meetings and petitions to demand land reforms, equal access to education and civil rights for the Dalit community.

Acchutanand was also a firm advocate for political representation, recognising that Dalits had been systematically excluded from the political processes that governed their lives. He called for the establishment of Dalit political organisations that could represent the community's interests and challenge the dominance of the upper

castes in local governance and the colonial administration. Through these efforts, he sought to give Dalits a voice in the political arena, which he saw as crucial for achieving social justice.

In addition to his political efforts, Achhutanand placed a strong emphasis on education as a means of social upliftment. Like many Dalit leaders of his time, he recognised that illiteracy and lack of access to education were among the primary barriers that kept Dalits in a state of economic and social subordination. He advocated for the establishment of schools and educational programs for Dalit children, arguing that education was the key to empowerment and self-determination. Achhutanand's efforts in this area helped to lay the foundation for later movements that sought to improve educational access for Dalits across India.

Education advocated for Dalit empowerment

The Fight Against Untouchability and Caste-Based Discrimination

Achhutanand was deeply committed to the fight against untouchability and the social exclusion of Dalits. Like other Dalit leaders, he recognised that caste-based discrimination was not just a matter of social stigma but also a form of structural violence that denied Dalits access to basic resources, public spaces and human dignity. In his speeches and writings, Achhutanand called for the abolition of untouchability and the dismantling of the caste system, arguing that these practices were incompatible with the principles of justice and equality.

Focus on untouchability and social exclusion

One of the unique aspects of Acchutanand's activism was his focus on cultural revival as a means of challenging caste-based oppression. He encouraged Dalits to reject the labels that had been imposed on them by the upper castes and to embrace their identity as Adi-Hindus, a term that gave them a sense of historical pride and self-respect. This focus on cultural identity was a significant departure from other anti-caste movements, which often focused primarily on legal and political reforms. For Acchutanand, the fight for social justice was also a fight for cultural recognition and the restoration of Dalits' rightful place in Indian society.

Adi-Hindus symbolised pride and self-respect

4.1.3.4 Periyar E.V. Ramasamy and the Dravidian Movement

Periyar E.V. Ramasamy, widely referred to as Periyar, stands out as one of the most influential and radical social reformers in India, particularly in the context of South India. Born in 1879 in Tamil Nadu into a wealthy, landowning Vaishya family, Periyar rejected his privileged background to lead a lifelong campaign against the Brahmanical order that dominated Indian society. His

Founded Dravidian Movement for equality

deep commitment to fighting caste-based oppression, his advocacy for women's rights and his promotion of rationalism made him a revolutionary figure in the social justice landscape of India. Periyar's work laid the foundation for the Dravidian Movement, which sought to challenge both the social and political dominance of Brahmins in Tamil Nadu and promote an egalitarian society.

Periyar's Critique of the Brahmanical System

Laid foundation for Dravidian Movement

Periyar's critique of the Brahmanical system was radical and uncompromising. He viewed Brahmanism—the religious and social dominance of Brahmins—as the root cause of social inequality in Indian society. According to Periyar, the caste system was not merely a social structure but an oppressive institution maintained by Brahmins through religious doctrines that legitimised their supremacy. He believed that Brahmins used Hindu scriptures, such as the Vedas and the *Manusmriti,* to maintain their control over education, politics and religious practices, thereby keeping the lower castes in a perpetual state of subjugation.

Saw caste system as institutional oppression

Periyar's critique extended beyond the caste hierarchy; he saw Brahmanical Hinduism as a mechanism of power that perpetuated ignorance and superstition among the masses. For him, religion was a tool used by the upper castes to maintain their dominance and this understanding became a key part of his social and political activism. He famously declared that "Religion is poison," arguing that the caste system was a social construct that could only be dismantled by rejecting the religious doctrines that supported it. This stance made Periyar's approach to social reform distinct from other reformers who sought to modify Hinduism from within; Periyar believed that Hinduism itself needed to be rejected to achieve true social equality.

The Dravidian Movement: Social, Political and Cultural Reform

South Indians seen as distinct from Aryans

The Dravidian Movement led by Periyar was a radical departure from previous social reform efforts in India. It was not only a movement aimed at social reform but also a broader political and cultural revolution that sought to assert the identity and rights of the Dravidian people—the non-*Brahmin* populations of South India. The movement was rooted in the belief that the people of South India, particularly the Tamils, were racially and culturally distinct from the Aryan populations of North India, represented by the Brahmins.

Periyar argued that the Aryan invasion of India had resulted in the imposition of Brahmanical supremacy in South India and the

Dravidian Movement sought to reverse this by promoting Dravidian culture and identity. This movement was not just about opposing Brahmin dominance but also about asserting Tamil identity and resisting the cultural imperialism of North India, particularly the imposition of Hindi as a national language. Periyar and his followers promoted the use of Tamil as a medium of education and governance, positioning the Dravidian Movement as both a cultural and political struggle.

The Dravidian Movement had a strong anti-Brahminical and anti-religious dimension. Periyar believed that the lower castes, particularly the Shudras and Dalits, could only achieve liberation by rejecting the religious and social authority of the Brahmins. He advocated for a rational and scientific approach to life, free from the superstitions and dogmas of religion. Periyar's rationalism was a key feature of the movement and he often organised public events where he encouraged people to break caste taboos, such as inter-caste dining and marriages without religious ceremonies. He also encouraged people to burn or destroy symbols of Brahminical oppression, such as images of Hindu gods or religious texts, as a means of liberating themselves from caste-based oppression.

The Self-Respect Movement

Perhaps Periyar's most notable contribution to social reform was the Self-Respect Movement, which he launched in 1925. The movement was based on the principle that self-respect was the cornerstone of social equality and that the lower castes could only achieve liberation by rejecting the ideologies that taught them to accept their inferior status. The Self-Respect Movement encouraged the lower castes, particularly the non-Brahmins, to reject the caste system, challenge Brahminical authority and embrace their dignity and self-worth.

The movement was revolutionary in its approach, as it sought to overturn the social norms that had kept the lower castes in subordination for centuries. Periyar advocated for inter-caste marriages, which he saw as a way to break down caste barriers and promote social integration. He also encouraged secular education as a means of liberating people from the ignorance and superstition perpetuated by religious institutions. The Self-Respect Movement was unique in its focus on women's rights, as Periyar believed that the oppression of women was intimately connected to the oppression of lower castes. He campaigned for the abolition of child marriage, the right of women to choose their partners and the right to divorce, all of which were radical ideas at the time.

The Self-Respect Movement also sought to demystify religious rituals and ceremonies. Periyar argued that religious rituals, particularly those performed by Brahmins, were designed to maintain social hierarchies. He encouraged the lower castes to reject Brahminical rituals, such as the sacred thread ceremony and to instead perform self-respect weddings that were free from religious symbolism. These weddings were often conducted without the involvement of priests and were based on the principle of equality between the bride and groom, in direct contrast to the hierarchical structure of traditional Hindu weddings.

Periyar's Advocacy for Women's Rights

Periyar's feminist ideology was a significant aspect of his social reform efforts. He believed that the subjugation of women was a critical component of the caste system and that the liberation of women was essential to the broader struggle for social justice. Periyar's advocacy for gender equality was radical for his time, as he campaigned for women's education, the right to choose their partners and the abolition of patriarchal practices such as child marriage, dowry and the treatment of widows.

Periyar viewed the oppression of women as a direct result of religious and caste-based hierarchies. He argued that Hindu religious texts, particularly the *Manusmriti*, prescribed a subordinate role for women, just as they did for the lower castes. In this way, Periyar linked the oppression of women to the Brahmanical order, viewing both as forms of social control designed to maintain the power and privilege of the upper castes. He called for women to reject the religious doctrines that justified their subjugation and to embrace rationalism and secular education as paths to liberation.

One of Periyar's most significant contributions to the feminist movement was his campaign for women's right to property. He argued that women should have equal rights to inherit and own property, a position that challenged the traditional Hindu laws that restricted women's access to economic resources. Periyar's emphasis on women's rights was part of his broader critique of the patriarchal family structure, which he saw as a microcosm of the larger caste system. By advocating for women's liberation, Periyar sought to dismantle the social structures that upheld both caste and gender hierarchies.

The Political Legacy of the Dravidian Movement

The political legacy of Periyar and the Dravidian Movement is most clearly seen in the rise of Dravidian political parties in Tamil

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Sidenotes:

▶ *Movement opposed Brahminical religious rituals*

▶ *Periyar linked women's liberation to caste reform*

▶ *Periyar connected women's oppression to caste*

▶ *He urged rationalism and secular education*

▶ *Periyar critiqued patriarchal family and caste*

Nadu, particularly the Dravida Munnetra Kazhagam (DMK) and its offshoot, the All India Anna Dravida Munnetra Kazhagam (AIADMK). These parties emerged from the social and political foundations laid by Periyar and have played a dominant role in Tamil Nadu politics since the 1960s. The principles of the Dravidian ideology—social equality, secularism and regional pride—continue to shape the political landscape of the state.

One of the lasting impacts of the Dravidian Movement has been the decline of Brahminical dominance in Tamil Nadu's political and social institutions. The movement's success in mobilising the non-*Brahmin* population, particularly the Backward Classes and Dalits, led to significant political reforms, including the introduction of reservations in education and employment for these communities. The DMK and AIADMK have both championed the cause of social justice through affirmative action policies, which have improved access to education and employment for historically marginalised communities.

Periyar's emphasis on Tamil identity and regional autonomy also influenced the language politics of Tamil Nadu. The Dravidian Movement's opposition to the imposition of Hindi as a national language, which Periyar saw as a form of cultural imperialism, led to the successful campaign for the promotion of Tamil as the official language of the state. This cultural assertion was part of the broader Dravidian resistance to North Indian dominance and has become a defining feature of Tamil Nadu's political identity.

Several scholars have examined the legacy of Periyar and the Dravidian Movement, highlighting its radical approach to social reform and its lasting impact on South Indian politics and culture. Political scientist Gail Omvedt argues that Periyar's anti-Brahminical stance was revolutionary in its rejection of both religious and social hierarchies. Omvedt emphasises that Periyar's approach was not merely about reforming Hinduism but about rejecting it entirely in favor of a rational and scientific worldview.

Historian A. R. Venkatachalapathy highlights Periyar's role in shaping the cultural politics of Tamil Nadu, particularly through his promotion of Tamil identity. Venkatachalapathy argues that Periyar's emphasis on Dravidian culture was a critical factor in the movement's success, as it gave the non-Brahmin population a sense of pride and belonging that countered the dominance of North Indian and Brahminical culture. He also notes that the Dravidian Movement's focus on regional autonomy and resistance to Hindi imposition continues to resonate in contemporary Tamil Nadu politics.

In her analysis of the Self-Respect Movement, feminist scholar V. Geetha argues that Periyar's critique of patriarchy was ahead of its time. She notes that Periyar's emphasis on women's rights—particularly the right to education, property and personal autonomy—was a radical departure from the patriarchal norms of his time. Geetha argues that Periyar's feminist ideology laid the groundwork for later feminist movements in Tamil Nadu and remains relevant in the ongoing struggle for gender equality in India.

Periyar E.V. Ramasamy's contribution to the Dravidian Movement and the broader struggle for social justice in India remains profound. His radical critique of Brahmanical Hinduism, his promotion of rationalism and self-respect and his advocacy for women's rights have left an indelible mark on the political and social landscape of Tamil Nadu. The Self-Respect Movement he founded continues to inspire movements for caste and gender equality and his legacy lives on in the Dravidian political parties that dominate Tamil Nadu's political scene. Periyar's vision of an egalitarian society free from caste and religious oppression remains a powerful call for social justice in India today.

4.1.3.5 B.R. Ambedkar's Critique of Caste

B.R. Ambedkar stands as one of the most prominent and intellectually rigorous critics of the caste system in modern India. His work, both as a scholar and a social reformer, represents the most comprehensive and radical critique of caste, particularly in its connection with Hinduism and its implications for social justice. Born in 1891 into a Dalit family, Ambedkar experienced caste-based discrimination firsthand, which deeply influenced his views on the inherent inequities of the caste system. His scholarship, combined with his personal experiences, allowed him to develop a critique that was both deeply intellectual and emotionally resonant for the millions of Dalits who suffered under the caste hierarchy.

Ambedkar's Personal Experience with Caste-Based Oppression

Ambedkar's early life was marked by experiences of social exclusion and humiliation because of his caste. As a child, he faced segregation in schools, where he was not allowed to sit with other children and had to drink water from a distance because his touch was considered polluting. These early experiences of untouchability left a deep impression on him and fueled his later efforts to dismantle the caste system. Despite these challenges, Ambedkar went on to become one of the most educated leaders of his time, earning

Periyar's critique of patriarchy was radical

Periyar's work inspired movements for equality

Ambedkar critiqued caste and Hinduism

Faced social exclusion in childhood

doctorates from Columbia University and the London School of Economics, where he studied law, economics and political science. His education provided him with the intellectual tools to critically analyse the caste system and its role in perpetuating inequality in Indian society.

Critique spanned social, economic, political dimensions

Ambedkar's personal experiences with caste-based discrimination were central to his critique of the caste system. He viewed caste not merely as a social structure but as an instrument of oppression that dehumanised those at the bottom of the hierarchy, particularly the Dalits. He argued that the caste system was designed to deny basic human rights to a large section of society and perpetuate the dominance of the upper castes, particularly the Brahmins. His critique was not limited to the social aspects of caste; he also examined its economic and political dimensions, arguing that caste-based discrimination was a barrier to democracy and social justice.

Ambedkar's "Annihilation of Caste" and Critique of Hinduism

Ambedkar's work critiques caste's incompatibility with democracy

One of Ambedkar's most influential works is his 1936 treatise, "Annihilation of Caste," which remains one of the most radical critiques of the caste system ever written. Originally written as a speech for the 'Jat-Pat Todak Mandal', a group of caste reformers, the address was never delivered because the organisers found Ambedkar's ideas too radical. In the text, Ambedkar argued that the caste system was fundamentally incompatible with the principles of democracy and social justice. He rejected the notion that caste was a benign division of labour, insisting that it was instead a division of labourers designed to exploit and degrade those at the bottom of the hierarchy.

Hinduism tied to caste inequality

Ambedkar's critique extended beyond the social structure of caste to the religious framework that supported it. He argued that Hinduism, with its Vedic scriptures and *Manusmriti*, was irredeemably tied to the caste system and that true social justice could not be achieved within its framework. He famously wrote, "You cannot have a democratic constitution and at the same time the caste system. The two are incompatible." Ambedkar's analysis of caste was rooted in historical materialism, as he sought to uncover the economic and social origins of the caste system and its role in maintaining the dominance of the upper castes.

In "Annihilation of Caste," Ambedkar also addressed Hindu reformers who sought to modify the caste system from within. He argued that efforts to reform Hinduism without addressing its core

inequalities were doomed to fail. He famously critiqued Mahatma Gandhi and other reformers who advocated for the removal of untouchability but not for the complete dismantling of the caste system. For Ambedkar, the caste system could not be reformed; it had to be destroyed to build a just and egalitarian society.

Ambedkar's critique of Hinduism was not limited to the caste system; he also critiqued its treatment of women and other marginalised groups. He argued that the patriarchal nature of Hindu society, as outlined in texts like the *Manusmriti*, was responsible for the oppression of women and the perpetuation of gender inequality. Ambedkar's analysis of Hinduism was thus not only a critique of caste-based oppression but also a broader critique of the social hierarchies embedded in Hindu religious practices.

Ambedkar's Call for Dalit Emancipation and Conversion to Buddhism

Ambedkar's rejection of Hinduism culminated in his decision to convert to Buddhism in 1956, along with hundreds of thousands of his followers. For Ambedkar, this conversion was both a personal rejection of Hinduism and a political statement. He believed that Hinduism was irredeemably tied to the caste system and that spiritual emancipation for Dalits could only be achieved by abandoning the religion that had oppressed them for centuries. Ambedkar's decision to convert to Buddhism was also influenced by his desire to provide Dalits with a moral and spiritual framework that was consistent with the principles of equality, justice and fraternity.

Ambedkar's conversion to Buddhism was rooted in his belief that the Buddhist doctrine of Dhamma offered an alternative path to spiritual and social liberation. He believed that Buddhism, with its emphasis on compassion, equality and social justice, was the only religion that could provide a moral framework for a caste-free society. In his speech titled "The Buddha and His Dhamma," Ambedkar articulated his vision of Buddhism as a revolutionary force that could challenge the oppressive social hierarchies of Hinduism. He argued that the Buddha's teachings on individual dignity and moral equality were essential for creating a just and egalitarian society.

Ambedkar's conversion to Buddhism also had significant political implications. It represented a rejection of Hindu identity and a reclamation of agency for Dalits, who had historically been denied both spiritual and political power. By embracing Buddhism, Ambedkar sought to create a new Dalit identity that was free from the stigma of untouchability and caste-based oppression. His

Ambedkar opposed partial caste reform

Complete caste dismantling essential for justice

Hinduism linked to gender oppression

Conversion to Buddhism

Buddhism promote dignity and equality

Buddhism redefined Dalit identity

conversion was a call for Dalits to reject the religious and social structures that had kept them in bondage and to embrace a new path of self-respect and equality.

Ambedkar's Contribution to the Indian Constitution and Social Justice

Ambedkar upheld liberty, equality, fraternity

Ambedkar's most enduring legacy lies in his role as the chief architect of the Indian Constitution. As the chairman of the drafting committee, Ambedkar ensured that the Constitution enshrined the principles of liberty, equality and fraternity—values that he believed were essential for creating a just society. Ambedkar's vision for the Constitution was deeply influenced by his critique of the caste system and his belief that social justice could only be achieved through legal and political reforms.

Abolition of untouchability (Article 17)

One of the key provisions that Ambedkar introduced into the Constitution was the abolition of untouchability. Article 17 of the Indian Constitution declares that "Untouchability is abolished and its practice in any form is forbidden." This provision was a direct challenge to the caste system and marked a significant step towards the legal emancipation of Dalits. Ambedkar also played a crucial role in ensuring the inclusion of affirmative action policies (known as reservations) in the Constitution. These policies provided for reserved seats for Scheduled Castes (SCs) and Scheduled Tribes (STs) in education, government jobs and legislative bodies, thereby providing historically marginalised communities with opportunities for social and economic mobility.

Political democracy needs social equality

Ambedkar's constitutional vision was rooted in his belief that political democracy could not survive without social and economic democracy. He famously argued that "On the social plane, we have in India a society based on the principle of graded inequality which means elevation for some and degradation for others." He believed that the caste system was incompatible with the principles of democracy and that without social equality, political democracy would be nothing more than a facade. Ambedkar's efforts to constitutionalise social justice were aimed at creating a society where every individual, regardless of caste, had equal access to rights and opportunities.

Promoted civil rights and secularism

Ambedkar's legacy in the Indian Constitution extends beyond his work on caste-based discrimination. He also championed civil liberties, women's rights and the rights of minorities. His commitment to secularism and constitutional morality continues to influence Indian jurisprudence and political thought. Ambedkar's vision for social justice remains a guiding principle in the ongoing struggle for equality and human rights in India.

Ambedkar's critique of caste and his contributions to social justice have been the subject of extensive scholarly analysis. Political scientist Gail Omvedt describes Ambedkar as a "radical democrat," emphasising that his vision of social justice went beyond mere legal reforms to include a complete restructuring of Indian society. Omvedt argues that Ambedkar's rejection of Hinduism and his embrace of Buddhism represent a spiritual and political revolution that challenged the very foundations of caste-based oppression.

▶ *Ambedkar sought societal restructuring*

Historian Eleanor Zelliot has written extensively on Ambedkar's role in the Dalit movement, highlighting his efforts to create a new Dalit identity that was rooted in self-respect and social equality. Zelliot argues that Ambedkar's decision to convert to Buddhism was a profound act of political defiance, as it represented a rejection of the religious structures that had oppressed Dalits for centuries. She also notes that Ambedkar's emphasis on education as a tool for social empowerment continues to resonate in contemporary Dalit struggles for equality.

▶ *Ambedkar redefined Dalit identity*

In his analysis of Ambedkar's work, sociologist André Béteille argues that Ambedkar's critique of caste was rooted in his liberal democratic ideals. Béteille suggests that Ambedkar's vision for social justice was deeply influenced by his exposure to Western liberal thought, particularly the works of John Stuart Mill and Thomas Paine. However, Béteille also notes that Ambedkar's critique of caste was uniquely Indian, as it was informed by his personal experiences with untouchability and his deep understanding of Hindu religious texts.

▶ *Indian experiences enriched his critique*

B.R. Ambedkar's critique of the caste system remains one of the most comprehensive and radical analyses of social inequality in modern India. His work, both as a scholar and a social reformer, continues to shape the discourse on social justice, equality and civil rights in India. Ambedkar's rejection of Hinduism, his embrace of Buddhism and his role in the drafting of the Indian Constitution have left an indelible mark on the country's political and social landscape. His legacy continues to inspire movements for Dalit empowerment, caste abolition and human rights across the globe. Ambedkar's vision of a society based on the principles of liberty, equality and fraternity remains as relevant today as it was during his lifetime.

▶ *Ambedkar redefined Indian social justice*

4.1.4 Caste-Based Movements for Social Justice and Civil Rights

Caste-based movements for social justice and civil rights in India have been pivotal in challenging the deeply entrenched inequalities

Challenging caste system inequalities

of the caste system. For centuries, the caste hierarchy, especially the institution of untouchability, has marginalised large sections of society, particularly the Dalits and Tribals depriving them of basic rights and human dignity. These communities have historically been excluded from accessing education, public spaces and economic resources, which entrenched their social and economic marginalisation. In response, various leaders and movements have emerged to challenge this system of oppression, advocating for social equality, economic justice and civil rights.

Aimed to dismantle caste system

The anti-caste movements have sought not just to reform but to completely dismantle the caste system, viewing it as incompatible with the values of democracy and human rights. Led by visionary figures such as Jyotirao Phule, Periyar E.V. Ramasamy and Dr. B.R. Ambedkar, these movements have worked to elevate the status of the lower castes through educational empowerment, political representation and economic reforms. At the heart of these movements is the recognition that the caste system is not merely a social structure but a profound mechanism of economic exploitation and political disenfranchisement.

Grassroots activism and reforms

Over time, caste-based movements for social justice and civil rights have taken many forms, from grassroots activism and self-respect movements to constitutional reforms that enshrined affirmative action policies, such as reservations in education and employment. These movements have significantly altered the social and political landscape of India, playing a crucial role in addressing centuries of systemic oppression. Despite the progress made, however, caste-based discrimination continues to persist in various forms, highlighting the ongoing need for activism and legal reforms in the pursuit of a more equitable society. The legacy of these movements and their leaders continues to inspire contemporary struggles for equality and social justice in India and beyond.

4.1.4.1 The Adi-Hindu Movement

Adi-Hindu movement emerged as resistance

The Adi-Hindu movement arose during the early 20th century as a direct response to the systemic marginalisation and discrimination faced by the Dalit community under the caste system. At the heart of this movement was the rejection of untouchability and the assertion of Dalit identity in the face of centuries of exclusion. The movement was primarily led by figures such as Swami Acchutanand, who became a powerful voice for Dalit rights, rallying the community to resist the oppressive structures that had relegated them to the lowest rungs of Indian society.

One of the most significant aspects of the Adi-Hindu movement was its use of the term "Adi-Hindu," which literally means "original Hindu" or "first Hindu." This term was a bold and deliberate attempt to reclaim the indigenous identity of Dalits by suggesting that they were the original inhabitants of India, long before the arrival of the Aryans, who, according to some theories, introduced the caste system. This claim was a direct challenge to the Brahminical narrative that had placed Dalits outside the bounds of the Hindu social order, labeling them as impure or untouchable. By adopting the label "Adi-Hindu," the movement sought to invert this narrative, presenting Dalits as the rightful inheritors of India's historical and cultural legacy, while simultaneously rejecting the imposed caste hierarchy.

The Adi-Hindu movement was not only about identity politics but also a movement for social and political mobilisation. Leaders like Swami Acchutanand recognised that Dalits had long been excluded from the political and economic realms of Indian society. As a result, the movement emphasised the need for education, land rights and access to public resources—all of which had historically been denied to Dalits due to their position in the caste hierarchy. The movement's leaders understood that education was key to breaking the cycle of poverty and oppression and they advocated for the establishment of schools and educational opportunities for Dalit children.

In addition to education, the Adi-Hindu movement sought to address the issue of land rights, which was particularly crucial in rural areas where land ownership was closely tied to social status and economic power. Dalits, who were often landless labourers, were at the mercy of upper-caste landowners. The movement called for land reforms and the redistribution of land to Dalits, which would not only improve their economic standing but also challenge the feudal structures that maintained the power of the upper castes.

The Adi-Hindu movement was also marked by its focus on civil rights and the mobilisation of mass protests to demand equality and justice. The movement organised demonstrations and public protests to assert the civil rights of Dalits, challenging practices such as the exclusion of Dalits from public spaces, temples and water sources. These protests were significant in drawing attention to the inhuman treatment of Dalits and helped to lay the groundwork for later Dalit movements that would take up similar causes, including the efforts led by Dr B.R. Ambedkar.

One of the enduring legacies of the Adi-Hindu movement is its contribution to the politicisation of Dalit identity. By organising

Sidebar margin notes:

▶ *Reclaim the indigenous identity of Dalits*

▶ *"Adi-Hindu" reclaiming indigenous dalit identity*

▶ *Focused on education, land rights and resources*

▶ *Land reforms crucial to economic empowerment*

around the concept of Adi-Hinduism, the movement fostered a sense of collective identity among Dalits, which was crucial in uniting them in their struggle against caste-based discrimination. The movement's emphasis on self-respect and dignity resonated with later Dalit leaders, including Ambedkar, who would expand on these ideas in his political initiatives.

The Adi-Hindu movement can be seen as a precursor to the larger Dalit movement that emerged in the mid-20th century, particularly under the leadership of Ambedkar. It laid the foundation for later efforts to redefine Dalit identity, secure constitutional rights and demand equal treatment under the law. By challenging the caste system and asserting the indigenous origins of Dalits, the Adi-Hindu movement played a pivotal role in shaping the discourse on caste and social justice in India.

4.1.4.2 The Namasudra Movement

The Namasudra community in Bengal, historically associated with occupations deemed menial by the caste hierarchy, spearheaded a significant movement for social justice and civil rights in the late 19th and early 20th centuries. Traditionally considered part of the lower castes, the *NamaAvarna* were often subjected to severe social exclusion and economic exploitation, particularly in the rural areas of Bengal, where the Brahmanical order and caste practices were rigidly enforced. The movement that emerged from the Namasudra community was driven by their struggle against landlessness and social marginalisation, but it soon expanded to include broader demands for land reforms, education and political representation.

Roots of the Namasudra Movement: Social and Economic Marginalisation

The *NamaAvarna* were primarily an agrarian community, often relegated to lower-caste occupations and denied access to land ownership, which was a critical marker of social and economic power in Bengal. Many *NamaAvarna* worked as landless labourers or tenants under upper-caste landowners, leaving them economically vulnerable and socially disenfranchised. Their marginalisation was compounded by their exclusion from public spaces and educational institutions, which were largely controlled by the upper castes.

The caste-based exclusion that the *NamaAvarna* faced was pervasive, affecting every aspect of their lives. They were denied access to temples, schools and even basic public resources such as wells, markets and roads, reinforcing their social isolation. This exclusion was not merely social but also institutional, as it was

Focused on civil rights and mass protests

Politicised Dalit identity and unity

NamaAvarna led a social justice movement

NamaAvarna excluded from land ownership

supported by the Brahmanical order that upheld the caste system as a divine and unchangeable hierarchy. The *Manusmriti*, a key Hindu text, justified such rigid divisions, asserting that lower castes, including the *NamaAvarna*, were inherently inferior and therefore deserving of their degraded social status.

Land Reforms and Economic Empowerment

The Namasudra movement was centered around the demand for land reforms. Land ownership was crucial not only for economic survival but also for social standing in rural Bengal. The majority of the NamaAvarna were tenants or sharecroppers working under upper-caste zamindars (landowners), a feudal system that left them in a state of economic dependency and vulnerability. The movement sought to challenge this system by demanding the redistribution of land and tenure rights for the Namasudra community. The leaders of the movement recognised that economic empowerment was essential for social liberation and they argued that land reforms would allow the NamaAvarna to gain economic independence and escape the cycle of exploitation.

The demand for land reforms also reflected the community's broader struggle against the feudal structures that perpetuated caste-based inequalities. The zamindari system, which was entrenched in Bengal, maintained the dominance of the upper castes and kept lower-caste communities like the NamaAvarna in perpetual poverty. By advocating for land redistribution, the Namasudra movement directly challenged this system, seeking to empower the landless and redistribute wealth more equitably.

Education and Political Representation

In addition to land reforms, the Namasudra movement placed a strong emphasis on education as a means of social and political empowerment. The community's leaders recognised that illiteracy and lack of access to education were key factors in maintaining their subjugation. Without education, the NamaAvarna had little opportunity to improve their social standing or participate in the political processes that governed their lives. As a result, the movement advocated for the establishment of schools for the Namasudra children and fought for their right to equal access to educational institutions, which were often reserved for the upper castes.

The movement's demand for political representation was also significant. The NamaAvarna, like other lower-caste groups, were systematically excluded from positions of power and decision-

making, both in local governance and in the broader political sphere. The movement sought to challenge this exclusion by advocating for political representation in local and colonial institutions. This was part of a broader effort to assert the civil rights of the Namasudra community and to ensure that they had a voice in the decisions that affected their lives.

Intersections with Anti-Colonial Struggles

Over time, the Namasudra movement became increasingly intertwined with the broader anti-colonial struggles that were gaining momentum across India. The leaders of the movement began to recognise the connections between caste-based exploitation and colonial rule, arguing that the British colonial government had a vested interest in maintaining the caste system as a means of controlling Indian society. The British often relied on upper-caste elites to serve as intermediaries between the colonial administration and the local population, thereby reinforcing the social hierarchies that kept lower-caste communities like the *NamaAvarna* in a subordinate position.

The Namasudra leaders argued that the colonial administration had perpetuated their marginalisation by failing to address the economic inequalities that were rooted in the caste system. They believed that true social justice could only be achieved through both anti-colonial resistance and the dismantling of the caste system. This dual focus on caste-based exploitation and colonial oppression positioned the Namasudra movement within the larger discourse on social justice and civil rights in colonial India.

4.1.4.3 Contributions of Ayyankali in Kerala

Ayyankali was a trailblazer in Kerala's struggle for Dalit rights and social justice, emerging as one of the most influential leaders of the early 20th century who fought against the oppressive caste system. Born in 1863 into a Pulayar (Dalit) family in Kerala, Ayyankali faced the harsh realities of caste-based discrimination from a young age. His community, the Pulayars, were considered at the bottom of the caste hierarchy and were subject to untouchability and social exclusion. They were denied basic human rights, including the right to walk on public roads, access to education and entry into public spaces such as markets and temples. These restrictions exemplified the caste apartheid that existed in Kerala, where the Brahmanical order and upper-caste domination were strictly enforced.

Ayyankali's Early Life and Experiences of Caste Discrimination

Ayyankali's early life was deeply shaped by the brutalities of the caste system. He witnessed firsthand the inhumane treatment of his community, who were relegated to working as agricultural labourers and were often exploited by upper-caste landlords. The Pulayars and other Dalit communities were forced to live on the outskirts of villages, segregated from the rest of society. They were forbidden from walking on roads used by upper castes, entering public buildings, or even wearing clean clothes that signified dignity and respect. These experiences of social exclusion and dehumanisation ignited Ayyankali's determination to challenge the caste system and fight for the rights of his people.

One of the most significant aspects of Ayyankali's leadership was his ability to organise the Dalit community into a cohesive social movement. At a time when most Dalits were illiterate and politically disenfranchised, Ayyankali recognised the need for grassroots mobilisation to challenge the entrenched social hierarchies. He understood that the struggle for Dalit rights would require a unified front that could articulate demands for equality, dignity and justice.

The *Villuvandi* Strike: A Defiant Stand Against Caste Oppression

One of Ayyankali's most famous acts of defiance was the *Villuvandi* (Cart) Strike of 1893, which marked a turning point in the fight for Dalit rights in Kerala. At the time, Dalits were forbidden from using public roads that were reserved for upper-caste communities. Ayyankali, determined to challenge this caste-based exclusion, led a protest by driving a bullock cart—a symbol of mobility and independence—along a road that was restricted to upper castes. This act of defiance was met with hostility and violence from the upper-caste elites, who saw it as a direct challenge to their social dominance.

The *Villuvandi* Strike became a powerful symbol of resistance against the caste system. It not only demonstrated Ayyankali's courage and leadership but also highlighted the broader issue of caste-based restrictions on movement and access to public spaces. The strike led to widespread protests and clashes between the Dalit community and the upper castes, bringing the issue of Dalit rights to the forefront of public discourse in Kerala. Ayyankali's bold action forced the colonial authorities to take notice of the injustice faced by Dalits, leading to the gradual opening up of public roads to all communities, regardless of caste.

Sidebar notes:
- *Ayyankali's fight for social justice*
- *Ayyankali organised Dalit social movement*
- *Ayyankali led the Villuvandi Strike*
- *Protest challenged caste-based exclusion*
- *Villuvandi Strike symbolised caste resistance*

Ayyankali's Advocacy for Dalit Education

Another critical aspect of Ayyankali's activism was his advocacy for education, which he saw as the key to emancipation for the Dalit community. At the time, Dalits were systematically denied access to formal education, which was reserved for the upper castes. This lack of education perpetuated the cycle of poverty and social exclusion that kept Dalits at the margins of society. Ayyankali understood that education was not only a tool for personal empowerment but also a means of political and social mobilisation for the Dalit community.

▶ Ayyankali's advocacy for Dalit education

In 1904, Ayyankali founded a school for Dalit children in Venganoor, his birthplace, challenging the upper-caste monopoly over education. This was a radical step at a time when Dalits were not allowed to attend schools and teachers refused to educate Dalit children. Ayyankali faced tremendous opposition from the upper castes, who viewed the education of Dalits as a threat to their social dominance. In response to these efforts, many upper-caste communities boycotted and attacked the schools, attempting to prevent Dalit children from attending.

▶ Founded school in Venganoor

However, Ayyankali persisted, in organising protests and leading efforts to demand educational rights for Dalits. His advocacy culminated in a significant legal victory when the Travancore government (then ruling the region) recognised the right of Dalit children to attend school. This was a monumental achievement in the fight for social justice in Kerala, as it opened the doors of education to Dalits and laid the foundation for future struggles for educational equality.

▶ Victory for Dalit education rights

Ayyankali's Role in Achieving Legal and Social Reforms

Ayyankali's activism extended beyond protests and education to the realm of legal and social reform. His leadership and grassroots organising were instrumental in pushing the Travancore government to pass laws that granted Dalits greater access to public spaces, such as markets, roads and temples. One of his major accomplishments was the Pulayar Agreement of 1910, which granted Dalits the right to walk on public roads that were previously closed to them. This legal victory was a significant milestone in the struggle for civil rights, as it challenged the Brahminical control over public spaces and began to dismantle the rigid segregation that had defined the lives of Dalits for centuries.

▶ Pulayar Agreement of 1910

Ayyankali also became a member of the Travancore Legislative Council in 1912, making him one of the first Dalits to hold a position of political power. His presence in the Council allowed him to advocate

directly for the rights of the Dalit community and he used this platform to push for further legal reforms that would improve the social and economic conditions of Dalits. His political work contributed to the growing recognition of Dalit rights in Kerala and set the stage for future political movements that would build on his legacy.

4.1.4.4 Poyikayil Appachchan: A Visionary Leader in the Dalit Struggle

Poyikayil Yohannan, better known as Poyikayil Appachchan, was a prominent social reformer, spiritual leader and advocate for Dalit rights in Kerala. Born in 1879 into the Paraiyar caste, Poyikayil Appachchan grew up witnessing the harsh realities of caste-based discrimination and untouchability. His life and work exemplify the merging of spirituality with social justice, as he used his religious movement, the Prathyaksha Raksha Daiva Sabha (PRDS), to liberate Dalits from the oppressive structures of caste and slavery, thus forging new cultural identities for the marginalised.

Early Life and Awareness of Caste Oppression

Poyikayil Yohannan was born to a family that was subjugated by the deeply entrenched feudal caste system of Kerala. His community, the Paraiyars, like many other Dalit communities, were agrestic slaves, working on the land of upper-caste landlords and Syrian Christians without the right to own land or move freely in public spaces. This state of subjugation was perpetuated through both religious and social structures, where Dalits were denied access to education, temples and basic rights. Appachchan's early experiences of caste violence, exploitation and religious exclusion shaped his resolve to fight for the emancipation of his community.

Although baptised as a Christian at a young age, Poyikayil Appachchan grew disillusioned with the missionary movement. The Christian Church in Kerala, despite advocating for equality, maintained caste-based segregation, often denying lower-caste Christians the same rights as their upper-caste counterparts. This led Appachchan to realise that conversion alone could not eliminate caste-based oppression. His growing disillusionment with Christianity's inability to address caste inequalities pushed him to find a new spiritual and social path that would be rooted in the experiences and needs of the Dalit community.

Founding the Prathyaksha Raksha Daiva Sabha (PRDS)

In 1909, Poyikayil Appachchan founded the Prathyaksha Raksha Daiva Sabha (PRDS), a spiritual and social reform movement

aimed at securing the emancipation of Dalits from both caste-based oppression and religious subjugation. The PRDS, meaning the "Church of the True Saviour," was a departure from both Brahmanical Hinduism and Christianity, which Appachchan saw as tools for perpetuating social exclusion and caste dominance. His movement advocated for the reclamation of Dalit identity, spiritual self-determination and a rejection of the hierarchical religious order.

Rejected caste oppression and religious subjugation

One of the key features of the PRDS movement was its emphasis on the spiritual autonomy of Dalits. Poyikayil Appachchan believed that salvation could not be found in either Hinduism or Christianity, both of which had upheld caste hierarchies. He argued that Dalits needed to create their spiritual path by recognising their history of oppression and rejecting the religious practices that had kept them in a state of slavery. His teachings emphasised the need for Dalits to develop a new spiritual consciousness, rooted in their shared experiences of suffering and resilience.

Emphasised Dalit spiritual autonomy

Critique of the Caste System and Religious Reforms

Poyikayil Appachchan's critique of the caste system was comprehensive and radical for its time. He saw the caste hierarchy as a tool of oppression that had been maintained by both religious and colonial structures. His central argument was that religion—whether Hinduism or Christianity—had been used to legitimise the dehumanisation of Dalits. He encouraged his followers to reject the religious texts and traditions that perpetuated inequality and to embrace a new theology that spoke to their history and struggle. In his teachings, salvation was not a distant promise of deliverance after death, but a spiritual awakening and liberation in the present, achieved through community solidarity and the reclamation of identity.

Salvation achieved through community and solidarity

One of the unique aspects of Appachchan's leadership was his use of songs and oral traditions to communicate his social and spiritual message. Songs were integral to the PRDS movement, as many Dalits were illiterate and excluded from written religious texts. Through his songs and poetry, Appachchan conveyed the pain of caste oppression, but also the hope for liberation and dignity. These songs became powerful tools for mobilising the Dalit community, providing them with a sense of collective identity and spiritual empowerment.

Used songs to convey spiritual message

His famous statement, "The Bible doesn't speak for us. We were never part of it," became the basis for a revolutionary critique of Christianity, positioning the PRDS as a movement that rejected

Rejected Christianity's relevance to Dalits

traditional religious texts in favor of an indigenous theology crafted by and for Dalits.

Poyikayil Appachchan and the Reclamation of History

Appachchan's work also centered on the reclamation of history for Dalits. His teachings emphasised that Dalits were not outsiders to Indian civilization but were its original inhabitants, who had been enslaved and marginalised by later invaders. This historical narrative was revolutionary, as it sought to redefine the place of Dalits in Indian history and society, countering the dominant Brahminical narrative that had relegated them to the margins. By reclaiming their history, Appachchan argued that Dalits could regain their dignity and self-worth.

▶ *Appachchan's work sought Dalit empowerment*

In the Prathyaksha Raksha Daiva Sabha, the experiences of slavery and oppression were central themes. The PRDS invoked the memory of slavery as a tool for political mobilization, encouraging Dalits to see their history not as one of subjugation but as a testament to their strength and resilience. Through rituals such as the Raksha Nirnaya Yogam, Appachchan transformed the collective trauma of Dalit slavery into a source of spiritual power and resistance.

▶ *Slavery memories were mobilised for resistance*

The PRDS and Social Mobilisation

Under Poyikayil Appachchan's leadership, the PRDS became a significant force for social and political mobilisation in Kerala. The movement advocated for land reforms, education and civil rights for Dalits, recognising that spiritual liberation needed to be accompanied by material progress. Appachchan argued that Dalits' liberation could not be achieved without addressing their economic disenfranchisement and lack of access to public resources. He worked to secure land ownership for Dalits and demanded the right to education as a tool for breaking the cycle of poverty and exclusion.

▶ *Appachchan emphasised economic progress for liberation*

In 1921, Poyikayil Appachchan was nominated to the Sri Moolam Praja Sabha, the legislative assembly of Travancore. In the assembly, he was a vocal advocate for Dalit rights, demanding land, agricultural credit and free education for the Dalit community. His speeches in the legislative assembly were prophetic, calling for the transformation of society and the end of caste-based oppression.

▶ *Speeches urged societal transformation*

4.1.4.5 The Dalit Panthers and the Radicalisation of the Dalit Movement

The Dalit Panthers, founded in 1972 in Maharashtra, represented a new phase in the Dalit movement. Modelled after the Black

Panther Party in the United States, the Dalit Panthers adopted a more militant approach to fighting caste-based discrimination and violence. The movement was inspired by Ambedkar's teachings but sought to address the ongoing social and economic inequalities that persisted despite the legal reforms enacted after independence.

The Dalit Panthers highlighted the intersectionality of caste, class and gender, emphasising that Dalit women were particularly vulnerable to violence and exploitation. They used literature, particularly Dalit literature, as a tool for raising awareness about the atrocities committed against Dalits. The movement also sought to challenge the economic exploitation of Dalits, many of whom were landless labourers working under oppressive conditions. The Dalit Panthers demanded not only civil rights but also economic justice, calling for land reforms and greater access to education and employment for Dalits.

The movements for social justice and civil rights in India have been diverse in their approaches and ideologies, but they all share a common goal: the dismantling of the caste system and the creation of a society based on equality and justice. From the early movements led by Phule and Periyar to the more recent struggles of the Dalit Panthers, these movements have played a crucial role in shaping the discourse around social justice in India. While significant progress has been made, the struggle for civil rights and social justice is far from over. Caste-based discrimination and violence continue to persist, particularly in rural areas, highlighting the need for continued activism and legal reform. The legacy of these movements and leaders like Ambedkar, Phule and Periyar continues to inspire new generations of activists committed to the cause of equality and justice.

4.1.5 Intersections Between Caste and Social Justice

Caste-based exclusion in India is not limited to social and religious discrimination but extends deeply into the economic and political spheres. As Ambedkar frequently pointed out, the caste system was designed to maintain economic inequality by confining lower-caste individuals to menial and degrading occupations. The denial of property rights and the exclusion from educational opportunities ensured that Dalits and other marginalised groups remained economically dependent on upper-caste landlords. Politically, the caste system functioned as a mechanism of exclusion, preventing Dalits from participating in governance or holding positions of power. Ambedkar's call for political representation for Dalits, particularly through the demand for

separate electorates, was a response to this systemic exclusion. He argued that without political power, Dalits would remain voiceless in the face of upper-caste domination. Despite opposition from figures like Gandhi, Ambedkar's insistence on political safeguards for Dalits eventually led to the introduction of affirmative action policies in India's Constitution.

Religion has historically played a central role in legitimising the caste system. The *Manusmriti*, regarded as a foundational text in Hindu law, explicitly sanctions caste-based discrimination and prescribes different rights and duties for individuals based on their caste. For Ambedkar, the religious justification of caste was one of the primary obstacles to social reform. He argued that Hinduism, as it was practised, could never be reconciled with the principles of equality and social justice. This realisation led him to reject Hinduism entirely and convert to Buddhism, which he believed offered a path to emancipation for Dalits. Ambedkar's conversion to Buddhism was not merely a personal decision but a political act, signalling his break with the religious system that had oppressed Dalits for centuries. His Navayana Buddhism reinterpreted Buddhist teachings to emphasise social equality and justice, providing Dalits with a spiritual framework that aligned with their struggle for civil rights.

► *The role of religion in caste-based exclusion*

4.1.6 Contemporary Reflections and Relevance

The legacy of anti-caste movements in India continues to shape contemporary social and political discourse. The Dalit Panthers, founded in the 1970s, drew inspiration from the anti-caste movements of Phule, Periyar and Ambedkar. The Panthers advocated for radical social reform, using literature, protest and political action to challenge caste oppression. In modern India, Dalit movements have evolved to address new forms of exclusion, such as economic inequality, educational disparities and caste-based violence. While the Indian Constitution provides legal safeguards for Dalits, including reservations in education and employment, the struggle for social justice remains ongoing. Caste-based violence, particularly against Dalit women, continues to be a pervasive issue, highlighting the need for continued activism and legal reform.

► *Continuation of anti-caste movements in modern india*

The legal framework established by the Indian Constitution, particularly the provisions for affirmative action (reservations), represents a significant step towards addressing caste-based inequality. Ambedkar's role in drafting the Constitution ensured that issues of social justice were embedded within India's legal system. However, the effectiveness of these provisions has been a subject of ongoing debate. While reservations have provided

▶ *Legal and constitutional framework for social justice*

opportunities for Dalits in education and employment, they have also sparked backlash from upper-caste groups, leading to calls for their repeal or revision. The challenge moving forward is to ensure that the legal and constitutional framework continues to evolve in response to the changing dynamics of caste-based exclusion in modern India.

Summarised Overview

The struggle for equality and social justice in India has been deeply intertwined with the oppressive structure of the caste system, which has, for centuries, defined and limited the social and economic lives of millions. Caste-based exclusion systematically marginalised lower castes, particularly the Dalits, stripping them of access to education, political power and basic human rights. This social structure created rigid divisions and inequalities, making it difficult for those at the bottom to rise above their predetermined social status.

In response to this systemic injustice, numerous anti-caste movements emerged, each of them aiming to challenge the exclusion and discrimination imposed by the caste system. These movements, driven by leaders who envisioned a society rooted in equality and justice, fought not only for civil rights but also for the larger goal of transforming social relations. They sought to break the cycle of marginalisation and uplift those who had long been denied their rights.

The movements for social justice and civil rights were not confined to one region or community. They arose from different parts of India, addressing the specific social and economic conditions of marginalised groups. The Adi-Hindu, Adi-Dravida and Namasudra movements, for example, focused on asserting the dignity of Dalits and creating new identities that could stand apart from the caste-based oppression they faced. These movements advocated for equal rights, access to education and greater political representation.

Central to the success of these movements were visionary leaders like Jyotiba Phule, Periyar EVR, Ayyankali, Swami Acchutanand and Poyikayil Appachchan. Each of these figures played a crucial role in leading their communities toward empowerment and social change. Their efforts helped reshape the discourse around caste, human rights and social justice in India. They not only challenged the discriminatory practices of their time but also laid the foundation for future generations to continue the fight for equality.

Through their advocacy, these leaders emphasised the importance of education, self-respect and organised resistance as tools for achieving social justice. They understood that true equality could only be realised when the lower castes were granted equal opportunities to participate in all aspects of society—social, political and economic.

The struggles for equality also paralleled broader global movements for civil rights and social justice, where oppressed groups sought legal and political reforms to dismantle

discriminatory structures. This process in India culminated in important reforms, such as the abolition of untouchability, affirmative action policies and the creation of reservations in education and employment, which were designed to give historically marginalised communities a fair chance at upward mobility.

The fight against caste-based exclusion and the movements for social justice were pivotal in shaping modern India's commitment to equality. While the challenges of exclusion and discrimination persist in various forms, the legacy of these movements reminds us of the continuous need to address inequalities and work toward a more just and inclusive society.

Assignments

1. Discuss the role of education in Dr. B.R. Ambedkar's vision of social justice.

2. What were the major challenges faced by anti-caste movements in 19th and 20th century India?

3. Explain how the caste system enforced social exclusion in pre-independent India.

4. Analyse the contributions of Ayyankali to the social and economic empowerment of Dalits in Kerala.

5. Discuss how the Adi-Dravida movement contributed to the upliftment of Dalits in Tamil Nadu.

6. Compare and contrast the ideas of Jyotiba Phule and Periyar EVR in their fight for social equality.

Suggested Reading

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1. Deshpandey, G. P., *Selected Writings of Jyoti Rao Phule*, LeftWord Books New Delhi, 2002

2. Thorat, Sukhdev and Narender Kumar, *B R Ambedkar and the Perspectives on Social Exclusion and Inclusive Policies*, OUP, Delhi, 2008.

3. Zelliot, Eleanor, *From Untouchable to Dalit: Essays on the Ambedkar Movement*, Manohar, Delhi, 2001.

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.

UNIT 2

Nationalism and the Caste Question

Learning Outcomes

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

♦ examine the Gandhi's understanding of *Varna* and Caste

♦ trace the strategies of Anti-Untouchability Programmes of Gandhi

♦ analyse the views of B.R. Ambedkar on Caste, Untouchability and Nationalism

Background

The relationship between nationalism and caste in India has been one of both cooperation and conflict. While the broader nationalist movement aimed to unite India against colonial rule, the entrenched system of caste presented a complex challenge to achieving true unity. For some leaders, nationalism meant focusing on independence from British rule without confronting the deep-rooted social inequalities in Indian society, particularly those related to caste. Others, like B.R. Ambedkar argued that freedom from colonialism was meaningless without first addressing caste oppression.

Mahatma Gandhi and B.R. Ambedkar represents two distinct approaches to the caste question within the framework of Indian nationalism. While Gandhi's approach to caste was rooted in his belief in *Varna* and the spiritual reform of society, Ambedkar viewed caste as an oppressive structure that needed to be completely dismantled for true equality and social justice to be achieved. The disagreements between Gandhi and Ambedkar, particularly over the issues of untouchability and caste-based inequality, shaped the larger discourse around nationalism and social reform in India.

Gandhi's anti-untouchability programmes sought to bring social reforms within the Hindu community while maintaining the framework of the *Varna* system. He believed in improving the condition of the *Harijans* (people of God, as he referred to Dalits), but without radically altering the traditional caste hierarchy. In contrast, Ambedkar's approach, outlined in his seminal work *Annihilation of Caste*, was a direct rejection of the caste system and its inherent inequalities. Ambedkar's critique of the dominant

nationalist movement was sharp, as he felt it ignored the plight of marginalised communities, focusing solely on independence without addressing internal injustices.

In this context, G Aloysius's work "Nationalism without a Nation in India" highlights the limitations of the Indian nationalist project, arguing that nationalism in India did not adequately address the concerns of the marginalised, especially Dalits. His critique highlights how dominant forms of nationalism often prioritised the concerns of the upper castes, leaving the subaltern classes without a voice.

Keywords

Nationalism, Caste Question, Untouchability, *Varna* System, Annihilation of Caste, *Harijan*

Discussion

4.2.1 Mahatma Gandhi's Position on Caste and *Varna*

▶ *Gandhi's caste paradox*

In the context of Indian nationalism and the fight for independence, Mahatma Gandhi's views on caste and *varna* have been a subject of considerable debate. Gandhi, as a central figure in the Indian independence movement, played a pivotal role in shaping both the political discourse and the social reform agenda of the time. His views on caste and the *varna* system, however, often appear paradoxical, as he sought to reconcile the age-old caste system with the modern ideals of equality and social justice. While Gandhi firmly opposed untouchability, he was more ambivalent about the caste system as a whole and defended the traditional concept of *varna*, albeit with a reinterpretation.

4.2.1.1 Gandhi's Understanding of *Varna* and Caste

▶ *Gandhi's varna idealism*

Mahatma Gandhi distinguished between *varna*, which he saw as an ideal social division of labour and caste, which he regarded as a perversion of the *varna* system. According to Gandhi, the *varna* system was not inherently unjust or oppressive, as it simply divided society into four occupational groups: Brahmins, Kshatriyas, Vaishyas and Shudras. He believed that this division was based on an individual's skills and duties rather than on birth and that it could serve as the foundation for a harmonious society if practised in its original, ideal form.

In Gandhi's view, the *varna* system was meant to ensure the smooth functioning of society by assigning different responsibilities to different groups. He argued that the Brahmins were responsible for spiritual guidance, the *Kshatriya*s for defense and governance, the *Vaishyas* for trade and the Shudras for manual labour. He believed that these roles were complementary and that each *varna* contributed to the overall welfare of society. For Gandhi, the ideal *varna* system did not imply a hierarchy of superiority or inferiority, but rather a division of labour that allowed individuals to contribute to society according to their natural abilities.

However, Gandhi was critical of the caste system as it had evolved in practice, particularly the rigid caste hierarchy that enforced social inequality and discrimination. He condemned the hereditary aspect of caste, which confined individuals to certain roles based on their birth rather than their abilities. For Gandhi, the original *varna* system was based on merit and capability, while the caste system, as it developed over time, degenerated into a social evil that perpetuated untouchability and exclusion.

4.2.1.2 Gandhi's Opposition to Untouchability

One of the most significant aspects of Gandhi's social reform agenda was his lifelong campaign against untouchability, which he considered the most egregious manifestation of the caste system's corruption. Gandhi referred to untouchables as Harijans or "children of God," to restore their dignity and emphasise their spiritual worth. He argued that untouchability was a moral failure of Hindu society and that it was incompatible with the ethical principles of Hinduism.

Gandhi's activism against untouchability was both symbolic and practical. He advocated for the eradication of untouchability through social reform, urging upper-caste Hindus to embrace untouchables as equals and integrate them into society. Gandhi undertook numerous fasts and campaigns to raise awareness about the plight of untouchables and to promote inter-caste harmony. He also encouraged upper-caste individuals to perform the tasks traditionally assigned to untouchables, such as cleaning latrines, to demonstrate that no work was inherently degrading.

Gandhi's efforts to reform Hindu society through the abolition of untouchability were part of his broader vision of *Swaraj* (self-rule), which, for him, was not just about political independence from British colonial rule but also moral and social regeneration. He believed that India could not achieve true independence unless it eradicated the social injustices perpetuated by the caste system, especially the practice of untouchability.

Marginal notes:
► *Varna as social harmony*
► *Caste system critique*
► *Campaign against untouchability*
► *Practical anti-untouchability efforts*
► *Untouchability and Swaraj*

4.2.1.3 Reinterpretation of *Varna*: The Ideal vs. Reality

▶ *Reforming varna*

While Gandhi was outspoken in his opposition to untouchability, his views on the *varna* system remained more conservative and complex. He did not call for the complete abolition of *varna*; instead, he sought to reform and reinterpret it in a way that would align with his vision of a just and egalitarian society. Gandhi believed that if the *varna* system was practiced according to its original principles, it would provide a framework for social harmony and cooperation rather than division and oppression.

▶ *Gandhi vs. Ambedkar on varna*

However, this position placed Gandhi in conflict with more radical anti-caste leaders, such as B.R. Ambedkar, who rejected the *varna* system outright. Ambedkar argued that the very concept of *varna*, regardless of its theoretical ideal, was inherently linked to social hierarchy and discrimination. For Ambedkar, the *varna* system and the caste system were inseparable and both needed to be dismantled to achieve true social equality. In contrast, Gandhi maintained that *varna* could be purified and restored to its original form, where it functioned as a division of labour without the oppressive practices associated with the caste system.

▶ *Gandhi's defense of varna*

Gandhi's emphasis on *varna* as an ideal led him to defend the system in some of his writings, though he remained critical of the way it had been distorted over time. He saw the potential for *Varna* to contribute to a non-competitive, cooperative society, where people performed their duties according to their abilities and lived in mutual respect. He opposed the idea of inter-*varna* competition and believed that each individual should focus on fulfilling the duties assigned to their *varna* for the benefit of the whole society.

4.2.1.4 Gandhi's Social Reforms and Political Struggles

▶ *Caste reform and nationalism*

While Gandhi's ideas on caste and *varna* were rooted in his spiritual vision, they had significant political implications as well. His efforts to reform the caste system and eradicate untouchability were part of his broader strategy to unite Indian society in the struggle for independence. Gandhi believed that inter-caste unity was essential for the success of the nationalist movement and that divisions within Hindu society would weaken the fight against colonialism.

Gandhi's social reforms were not without controversy and his ambivalence about the *varna* system attracted criticism from both conservatives and radicals. Conservative Hindus resisted his efforts to abolish untouchability, viewing it as an essential part of

the Hindu religious order. On the other hand, anti-caste activists like Dr. Ambedkar criticised Gandhi for not going far enough in his rejection of caste and *varna*. Ambedkar argued that Gandhi's defence of the *varna* system perpetuated the very social hierarchies that needed to be dismantled to achieve true equality.

Despite these criticisms, Gandhi remained committed to his vision of Swaraj, which included both political independence and social reform. He believed that India's spiritual and moral renewal was just as important as its political liberation and that the abolition of untouchability was a necessary step in that process. His campaigns for inter-caste unity and the eradication of untouchability helped to raise awareness about the plight of Dalits and laid the foundation for later struggles for social justice.

4.2.2 Gandhian Nationalism and Anti-Untouchability Programmes

Mahatma Gandhi's nationalism was not solely focused on achieving political independence from British colonial rule; it was deeply intertwined with his vision for a socially just and egalitarian society. Central to this vision was his commitment to the eradication of untouchability, which he regarded as one of the most profound moral feelings of Indian society. Gandhi's anti-untouchability programmes became a key component of his larger *Swaraj* (self-rule) movement, as he believed that India could not attain true freedom unless it addressed the social inequalities embedded within the caste system, particularly the practice of untouchability. Gandhi's efforts to reform Hindu society and eradicate untouchability were rooted in his moral philosophy and were carried out through various social campaigns and political initiatives.

4.2.2.1 Gandhi's Moral Opposition to Untouchability

For Mahatma Gandhi, untouchability was not just a social injustice, but a moral sin that violated the principles of truth, nonviolence and equality, which were at the core of his philosophy. Gandhi referred to the untouchables as Harijans, meaning "children of God," to emphasise their spiritual equality with the rest of society. He saw untouchability as a corruption of Hinduism and a distortion of the *varna* system, which, according to him, was originally intended to be a division of labour based on function, not hierarchy or birth.

Gandhi's moral stance against untouchability was based on the belief that every individual, regardless of their social status, was a

manifestation of the divine and therefore deserving of dignity and respect. He viewed the practice of untouchability as incompatible with the principles of *ahimsa* (nonviolence) and sought to eliminate it through moral persuasion and spiritual awakening. Gandhi frequently spoke out against untouchability in his writings and public speeches, urging Hindus to reform their attitudes and behaviours toward Harijans.

▶ Divine Dignity

4.2.2.2 Anti-Untouchability Campaigns: Key Programmes and Strategies

Gandhi's efforts to eliminate untouchability took the form of grassroots movements, social reforms and political campaigns, which he integrated into the broader Indian nationalist struggle. His anti-untouchability programme consisted of several key initiatives:

▶ Anti-Untouchability Movement

Temple Entry Movements

One of the most significant aspects of Gandhi's anti-untouchability programme was his campaign for temple entry rights for Dalits. In many parts of India, untouchables were barred from entering Hindu temples, which symbolised their exclusion from religious and social life. Gandhi led efforts to open temples to Harijans, believing that their inclusion in religious practices would help to dismantle the social barriers that perpetuated untouchability. The Vaikom Satyagraha (1924-1925) in Kerala was one such movement, where Gandhi supported the demands of lower castes to access roads leading to temples, eventually leading to greater discussions about temple entry rights for Dalits across India.

▶ Temple Entry Campaign

Harijan Sevak Sangh

In 1932, after the Poona Pact between Gandhi and Dr. B.R. Ambedkar, who secured reserved seats for Dalits in legislative bodies, Gandhi founded the Harijan Sevak Sangh (Servants of the Untouchables Society) to address the social and economic conditions of Harijans. The organisation aimed to improve the lives of untouchables by promoting education, hygiene, vocational training and economic development. The Harijan Sevak Sangh worked at the grassroots level to integrate Dalits into the broader social fabric by providing access to public services and advocating for the abolition of untouchability.

▶ Harijan Sevak Sangh

Fasts and Moral Appeals

Gandhi frequently used to fast as a means of expressing his moral opposition to untouchability and raising awareness about the issue. One of the most notable instances was his fast unto death

in 1932, following the British government's decision to create separate electorates for Dalits under the Communal Award. Gandhi believed that separate electorates would further isolate Dalits from the rest of Indian society and prevent their integration into the Hindu fold. His fast was a dramatic and controversial act of protest, aimed at uniting the Hindu community and highlighting the moral imperative to end untouchability. While this fast led to the Poona Pact, it also sparked debate about Gandhi's approach to Dalit representation.

Fast for unity

Promotion of Manual Labour

Gandhi sought to dignify manual labour, particularly the work traditionally performed by untouchables, such as cleaning latrines and other sanitation-related tasks. He believed that by encouraging upper-caste Hindus to engage in these tasks, he could challenge the stigma associated with untouchability and promote the idea that no job was inherently degrading. Gandhi himself practiced manual labour as a form of self-purification and led by example, urging his followers to do the same. This was part of his broader vision of social reform and self-reliance, which he saw as essential for India's spiritual and political liberation.

Dignifying labour

Harijan Journals and Publications

Gandhi launched several publications, including the *Harijan Journal*, to spread his message against untouchability. These publications served as platforms for educating the public about the moral and social evils of untouchability and for advocating reforms to integrate Dalits into the broader Indian society. Gandhi used these journals to reach a wide audience, including both upper-caste Hindus and Dalits and to advocate for inter-caste solidarity in the fight for independence.

Harijan publications

4.2.3 Criticism of Gandhi's Anti-Untouchability Programme

Despite Mahatma Gandhi's sincere efforts to address untouchability, his anti-untouchability programmes faced significant criticism, particularly from Dalit leaders like Dr. B.R. Ambedkar and other radical thinkers. While Gandhi's intentions were generally viewed as genuine, his methods and ideological framework were considered inadequate for tackling the structural inequalities entrenched in the caste system. Many critics argued that Gandhi's approach was too limited, focusing narrowly on the symptoms of caste oppression—such as untouchability—without confronting the institutional mechanisms that perpetuated caste-based discrimination.

Criticism of Gandhi

4.2.3.1 Failure to Challenge the Caste System Itself

One of the central criticisms levelled against Gandhi's anti-untouchability programme was that it did not go far enough in challenging the caste system itself. Gandhi sought to reform the practice of untouchability but did not advocate for the complete abolition of caste hierarchies. His view of the caste system, particularly his defense of the *varna* system, suggested that Gandhi accepted the basic social divisions within Hindu society, believing they served a functional role. He argued that caste in its original form was not inherently oppressive, as the *varna* system was designed as a division of labour, not of rank. For Gandhi, it was the degeneration of the *varna* system into a hereditary caste that led to untouchability, not the caste system itself.

▶ *Defense on caste hierarchy*

However, for Ambedkar and other Dalit leaders, this approach was seen as inadequate because it failed to address the root cause of untouchability—the very existence of the caste system and the Brahmanical order that upheld it. Ambedkar argued that caste and untouchability were inextricably linked and that any attempt to eliminate untouchability without dismantling the caste hierarchy was superficial and bound to fail. In Ambedkar's view, as long as the caste system remained intact, Dalits would continue to be marginalised and oppressed. He called for the complete annihilation of caste, whereas Gandhi was more concerned with purifying and reforming the system.

▶ *Annihilation vs. Reform*

4.2.3.2 Narrow Focus on Moral Reform

Gandhi's approach to untouchability was primarily moral and spiritual, grounded in his belief that upper-caste Hindus needed to purify themselves by abandoning untouchability and embracing Harijans as equals. His solution emphasised moral reform and self-purification rather than systemic change. Gandhi argued that untouchability was a moral failing on the part of Hindus and that by changing their attitudes and behaviour, they could uplift untouchables and integrate them into Hindu society.'

▶ *Moral purification*

While Gandhi's moral approach resonated with many of his followers, it was criticised for being too narrow. Critics argued that focusing on the individual morality of upper-caste Hindus failed to address the institutional structures that perpetuated caste-based discrimination. Gandhi's emphasis on personal transformation did not confront the economic, political and social mechanisms that reinforced the caste hierarchy and kept Dalits in a state of perpetual oppression.

▶ *Criticism of Gandhi's approach*

Ambedkar, in contrast, took a more structural approach to the problem of untouchability, arguing that legal reforms, economic redistribution and political empowerment were necessary to dismantle the caste system and create true equality. He believed that moral reform alone would never be sufficient to achieve social justice for Dalits.

4.2.3.3 Reinforcement of Hindu Paternalism

Another major criticism of Gandhi's anti-untouchability programme was that it often reinforced Hindu paternalism. Gandhi's efforts to "uplift" Dalits were seen by many Dalit leaders as paternalistic and condescending. His use of the term "Harijan", meaning "children of God," was meant to restore the dignity of Dalits, but many Dalits, including Ambedkar, found it patronising. They felt that Gandhi's approach framed Dalits as passive recipients of upper-caste benevolence rather than as active agents in their liberation.

Gandhi's Harijan programme focused on improving the condition of Dalits within the Hindu fold, without challenging their subordinate position within the broader social structure. By advocating for the reform of Hindu society rather than the emancipation of Dalits from the caste hierarchy, Gandhi's efforts were seen as reinforcing the power dynamics that kept Dalits dependent on upper-caste Hindus. Ambedkar criticised Gandhi for upholding the status quo, arguing that true empowerment for Dalits could only come through self-determination and independent political representation, not through upper-caste charity.

4.2.3.4 Ambedkar's Critique: The Call for Dalit Autonomy

The sharpest critique of Gandhi's anti-untouchability programme came from Dr. B.R. Ambedkar, who rejected Gandhi's insistence on keeping Dalits within the Hindu fold. Ambedkar believed that the caste system was so deeply embedded in Hinduism that Dalits would never achieve true equality or dignity as long as they remained part of Hindu society. For Ambedkar, the spiritual reform that Gandhi advocated was insufficient; what was needed was a complete rejection of Hinduism and its caste-based religious doctrines. Ambedkar famously declared that "Hinduism is nothing but a chamber of horrors," and he ultimately led mass conversions of Dalits to Buddhism in 1956 as a way to escape the tyranny of caste.

Ambedkar also opposed Gandhi's stance on separate electorates for Dalits, which was a critical point of contention between the two

▶ Ambedkar's advocacy for separate electorates

leaders. While Gandhi advocated for reserved seats for Dalits within the framework of joint electorates, Ambedkar argued that Dalits needed separate electorates to ensure their political autonomy. He believed that Dalits could not rely on upper-caste Hindus to represent their interests and that only independent political power would allow them to secure their rights and advance their social position.

▶ Paternalistic approach of Gandhi

For Ambedkar, Gandhi's approach to Dalit upliftment was paternalistic and it reflected an attempt to preserve Hindu unity at the expense of Dalit autonomy. Ambedkar was deeply sceptical of Gandhi's commitment to abolishing caste and he saw the Harijan programme as a way to maintain the existing social order rather than dismantle it.

4.2.3.5 Criticism from Radical Dalit Leaders and Movements

▶ Dalit critique on Gandhi

Beyond Ambedkar, other Dalit intellectuals and radical movements also criticised Gandhi's anti-untouchability efforts. For many Dalit activists, Gandhi's focus on religious reform did not address the economic exploitation and social exclusion that Dalits experienced daily. Radical Dalit movements, such as those inspired by Ambedkar's thought, emphasised the need for class struggle and economic justice in addition to the fight for social equality. They argued that Gandhi's focus on moral transformation neglected the material conditions that perpetuated Dalit poverty and powerlessness.

▶ Economic realities

Some activists viewed Gandhi's Harijan Sevak Sangh and his temple entry movements as symbolic gestures that did little to alter the economic realities of Dalit life. They contended that Gandhi's approach was focused on ritual inclusion rather than structural change and that his emphasis on temple entry was out of step with the broader demands of the Dalit movement, which prioritised land redistribution, education and employment over religious access.

4.2.3.6 Gandhi's Defense and Reactions to Criticism

▶ Swaraj vision and moral regeneration

In response to these criticisms, Gandhi maintained that his anti-untouchability programme was an essential part of his *Swaraj* (self-rule) vision, which included not only political independence from British rule but also the moral regeneration of Indian society. Gandhi defended his approach by arguing that social unity was essential for national unity and that the abolition of untouchability was a crucial first step in the reform of Hinduism. He believed that upper-caste Hindus needed to be morally persuaded to change their attitudes toward untouchables and that social reform had to come from within the Hindu community.

However, Gandhi's refusal to denounce the caste system outright and his continued support for *varna*, left many critics unconvinced. They argued that Gandhi's approach did not challenge the inherent hierarchies of the caste system and that his focus on spiritual reform was insufficient to address the systemic oppression faced by Dalits. This tension between reform and revolution continues to be a subject of debate.

Reform vs. Revolution

4.2.4 Gandhi and Ambedkar: The Debate on Caste and Untouchability

The debate between Mahatma Gandhi and Dr. B.R. Ambedkar over the issue of caste and untouchability represents one of the most significant ideological confrontations in modern Indian history. Although both leaders were committed to improving the conditions of Dalits, their approaches, methods and philosophical frameworks were fundamentally different. The divide between Gandhian nationalism and Ambedkarite radicalism reflected not only different understandings of social reform but also conflicting visions of Indian society and Hinduism.

Gandhi- Ambedkar Debate

4.2.4.1 Gandhi's Reformist Approach to Untouchability

Mahatma Gandhi's views on untouchability were deeply rooted in his spiritual philosophy and his commitment to Hindu reform. Gandhi was fundamentally opposed to untouchability, viewing it as a moral sin and a stain on Hinduism. However, he did not believe that the caste system itself was inherently unjust. For Gandhi, the caste system, as originally conceived in the *varna* system, was a division of labour that allowed society to function harmoniously. He argued that the *varna* system had degenerated over time into a rigid caste system, which led to social hierarchy and untouchability. Gandhi's goal was to reform Hinduism from within, purging it of the practice of untouchability while retaining the *varna*-based social order.

Hindu reform

Gandhi viewed Harijans (as he called the Dalits) as integral to Hindu society and believed that their social integration could be achieved through moral reform and education. He argued that upper-caste Hindus must purify themselves by abandoning the practice of untouchability and embracing Harijans as equals. Gandhi's moral persuasion emphasised the need for self-purification among the upper castes, rather than focusing on radical structural changes in society. His solution was to uplift Dalits through spiritual equality within the Hindu fold, not by dismantling the caste system itself. He believed that Dalits should remain within Hinduism and that their condition could be improved by instilling self-respect and fostering inter-caste solidarity.

Moral integration

4.2.5 Ambedkar's Radical Critique of Caste and Hinduism

Ambedkar's radicalism

In contrast, Dr. B.R. Ambedkar's approach to untouchability and caste was far more radical and systemic. For Ambedkar, untouchability was not an isolated problem but rather a symptom of the structural violence inherent in the caste system. Unlike Gandhi, who sought to reform Hinduism from within, Ambedkar believed that the caste system was so deeply embedded in the religious framework of Hinduism that true social equality for Dalits could never be achieved as long as they remained within the Hindu fold. Ambedkar viewed caste as an institution of oppression, sanctioned by Hindu religious texts such as the *Manusmriti*, which justified the subordination and dehumanisation of lower castes and Dalits.

Annihilation of caste

Ambedkar's critique was not merely against untouchability but against the entire caste system, which he argued was inherently exploitative and divisive. In his famous work "Annihilation of Caste," Ambedkar rejected the notion that the caste system could be reformed. Instead, he called for its complete dismantling, arguing that caste was a form of graded inequality that perpetuated social hierarchy and domination. Ambedkar believed that Dalits could only achieve true emancipation by breaking away from Hinduism and its religious structures, which he saw as inherently supportive of caste-based discrimination. This led him and many of his followers to convert to Buddhism in 1956, seeking spiritual and social liberation outside the boundaries of Hinduism.

4.2.5.1 The Poona Pact of 1932: A Pivotal Conflict

Disputes on separate electorates

The Poona Pact of 1932 marked a critical moment in the relationship between Gandhi and Ambedkar. The conflict arose over the Communal Award issued by the British government, which provided for separate electorates for various minority communities, including Dalits. Ambedkar supported the idea of separate electorates for Dalits, believing that this would give them the political autonomy they needed to protect their interests in a system dominated by upper-caste Hindus. He argued that without independent political representation, Dalits would remain vulnerable to upper-caste domination and would be unable to fight for their rights within the framework of a Hindu-majority electorate.

Fast for Unity

Gandhi, however, vehemently opposed the idea of separate electorates for Dalits. He believed that creating separate electorates would further divide Hindu society and solidify caste divisions. Gandhi feared that such a division would weaken the nationalist movement, as it would create separatism among Hindus at a time when unity was essential for the fight against British colonialism.

To prevent the implementation of separate electorates, Gandhi embarked on a fast unto death in 1932, declaring that he would rather die than see Hindu society divided in this way.

▶ *Ideological divide*

Faced with the moral pressure of Gandhi's fast and the fear of being blamed for his death, Ambedkar reluctantly agreed to negotiate. The result was the Poona Pact, a compromise that replaced separate electorates with reserved seats for Dalits in joint electorates. While this gave Dalits some degree of political representation, it did not provide them with the independent political space that Ambedkar had originally envisioned. The Poona Pact reflected Gandhi's desire to maintain social unity within the Hindu community, but it also highlighted the deep ideological divide between his approach to untouchability and Ambedkar's broader vision for Dalit liberation.

4.2.5.2 Divergence in Strategies: Social Unity vs. Dalit Autonomy

▶ *Gandhi's focus on Unity*

The Poona Pact encapsulated the philosophical divide between Gandhi and Ambedkar. Gandhi's approach to caste reform was driven by his commitment to social unity, which he believed was essential for national liberation. He saw the issue of untouchability as one that could be resolved through moral reform, education and inter-caste solidarity. For Gandhi, maintaining Hindu unity was a priority and he feared that separate political representation for Dalits would fragment the nationalist movement and weaken the struggle against British colonialism.

▶ *Dalit empowerment*

Ambedkar, on the other hand, prioritised the autonomy and empowerment of Dalits above the question of national unity. He argued that without independent political power, Dalits would continue to be marginalised and exploited by the upper castes. Ambedkar saw political representation as a means of achieving social justice for Dalits and he believed that separate electorates were essential for protecting their interests. For Ambedkar, the nationalist movement's insistence on unity often came at the expense of Dalit rights and he was critical of Gandhi's paternalistic approach to the problem of untouchability.

▶ *Unresolved disagreements*

The Poona Pact did not resolve the fundamental disagreements between Gandhi and Ambedkar and their relationship remained tense in the years that followed. Ambedkar continued to be critical of Gandhi's approach to caste reform, particularly his defense of the *varna* system and his reluctance to confront the deep-rooted inequalities of Hindu society. Ambedkar argued that Gandhi's solution to untouchability was too gradualist and failed to address the structural foundations of the caste system. He saw

Gandhi's Harijan programme as insufficient because it focused on moral upliftment rather than legal and political reforms that would fundamentally alter the position of Dalits in Indian society.

In contrast, Gandhi remained committed to his vision of Hindu reform and inter-caste solidarity. While he recognised the need for social change, he believed that the caste system could be reformed through spiritual awakening and self-purification. Gandhi's focus on moral persuasion and his opposition to separate political representation for Dalits reflected his belief that social unity was essential for the larger nationalist struggle.

▶ *Focus on Hindu Unity*

4.2.6 Ambedkar on Caste, Untouchability and Nationalism

Dr. B.R. Ambedkar, one of India's most prominent leaders and thinkers, played a pivotal role in shaping the discourse on caste, untouchability and nationalism in 20th century India. His deep critique of the caste system and his vision for social justice diverged sharply from the Gandhian approach and his ideas continue to resonate with those fighting for equality and human dignity. Ambedkar viewed caste not as a superficial issue but as the core structural problem of Indian society, arguing that without dismantling the caste system, India could never achieve true democracy, equality or freedom.

▶ *Vision for social justice*

4.2.6.1 Ambedkar's Critique of the Caste System

For Ambedkar, the caste system was a deeply entrenched and exploitative institution that perpetuated social inequality and hierarchical division. He argued that caste was not just a division of labour, as some reformers like Mahatma Gandhi claimed, but rather a division of labourers, aimed at keeping the lower castes, particularly the Dalits, subjugated and powerless. Ambedkar's critique was based on the belief that caste operated as a form of graded inequality, with different castes enjoying different degrees of privilege, but all under the control of the Brahmanical elite.

▶ *Dalit subjugation*

Ambedkar also exposed the religious foundation of the caste system, particularly its sanction by Hindu scriptures such as the *Manusmriti*, which justified the superiority of Brahmins and the subjugation of Shudras and Dalits. He viewed the caste system as a religiously ordained form of social control that had been maintained for centuries to enforce purity and pollution laws that ensured the dominance of the upper castes. In his view, the caste system was not just a social institution, but a theological construct designed to maintain social hierarchy and perpetuate oppression.

▶ *Purity-pollution laws*

4.2.6.2 Untouchability as Structural Violence

In Ambedkar's analysis, untouchability was not just a social stigma but a form of structural violence perpetuated through the caste system. He argued that Dalits—whom he referred to as Scheduled Castes or Depressed Classes—were not just excluded from public spaces and ritual practices, but were also deprived of basic human dignity and citizenship rights. Untouchability, in Ambedkar's view, was the most dehumanising form of caste-based oppression, as it relegated millions of Dalits to a life of poverty, violence and social exclusion.

▶ *Dehumanisation*

Ambedkar was critical of the Gandhian approach to untouchability, which focused on moral reform and religious inclusion rather than addressing the systemic inequalities that underpin caste-based discrimination. While Gandhi advocated for Harijan upliftment within the framework of Hinduism, Ambedkar saw untouchability as inherently tied to the caste system and Hindu religious doctrines. He believed that reforming Hinduism or encouraging moral change among upper-caste Hindus would never fully address the fundamental issues of exclusion and oppression faced by Dalits.

▶ *Fundamental issues*

4.2.6.3 Ambedkar on Nationalism and Caste

Ambedar's notion of nationalism is reflected in a hard-hitting treatise in 1936 called *Annihilation of Caste*, which questioned the very inclusive nature of Indian civilisation. In his perception of history, the foundation principle of this civilisation was caste exclusion or *Varnashrama dharma*, which condemned several million untouchables to the status of social outsiders in their land. In 1945, he wrote another book *What Congress and Gandhi have done to the Untouchables*, he was not opposed to swaraj or self-rule, but he asked: "Tell me what share I am to have in the *swaraj*". In other words, he was not questioning Indian nationhood and did not claim a separate sovereign state for the Dalit, he was concerned about their rights of citizenship and their location within the imminent power structure of the new Indian nation-state.

▶ *Ambedkar's works*

Ambedkar's understanding of Indian nationalism was shaped by his belief that true national unity could not be achieved without addressing the caste question. He argued that the nationalist movement, led predominantly by upper-caste elites, often ignored the interests of Dalits and other marginalised groups, focusing instead on political independence from British rule. Ambedkar believed that political independence without social justice would simply result in the transfer of power from the British colonisers to the Brahminical upper castes, leaving the caste hierarchy intact.

▶ *Caste question*

For Ambedkar, the real struggle for India's freedom lay in the emancipation of the oppressed castes, particularly the Dalits, from centuries of social and economic bondage. He believed that the nationalist movement's failure to address the caste system would result in an incomplete form of freedom, where millions of Dalits would remain trapped in a cycle of poverty, illiteracy and social exclusion. Ambedkar often critiqued the mainstream nationalist leadership, including Gandhi and the Congress Party, for their reluctance to confront caste inequalities head-on.

Poverty, literacy and social exclusion

4.2.6.4 Ambedkar's Call for Dalit Autonomy

Ambedkar was a staunch advocate for Dalit political autonomy and believed that Dalits needed independent political representation to secure their rights and interests. His demand for separate electorates for Dalits, proposed during the Round Table Conferences in the early 1930s, was based on his belief that Dalits could not rely on upper-caste leaders to represent their interests. Ambedkar argued that joint electorates would result in the dominance of upper-caste Hindus, who would continue to neglect or oppress the Dalit population.

Demand for separate electorates

4.2.6.5 Ambedkar and His "Annihilation of Caste"

One of Ambedkar's most famous works, "Annihilation of Caste", published in 1936, is a powerful critique of the caste system and a call for its destruction. The essay, originally written as a speech for a conference of caste reformers, was never delivered because its contents were considered too radical by the organisers. In "Annihilation of Caste," Ambedkar laid bare the brutality of the caste system and argued that any attempt to reform Hinduism without addressing the issue of caste was doomed to failure.

Annihilation of caste

Ambedkar's central argument in this text was that the caste system was a fundamental violation of human rights and democratic principles. He rejected the notion that caste could be reformed, insisting that it was a pervasive social evil that had to be annihilated in its entirety. Ambedkar argued that Hindu society was incapable of true reform because the caste system was ingrained in its religious and cultural traditions. He called for Dalits and other oppressed castes to reject Hinduism altogether and embrace new forms of social and spiritual liberation.

Violation of Human Rights

Ambedkar's "Annihilation of Caste" was a direct challenge to Gandhian nationalism, which sought to reform the caste system without dismantling it. In the text, Ambedkar critiqued Gandhi's defense of the *varna* system, arguing that even in its ideal form, the caste system perpetuated social hierarchies and inequality.

He contended that no amount of moral reform could address the structural inequalities embedded within Hindu society. His call for total emancipation through the destruction of caste resonated with millions of Dalits, who saw in Ambedkar's message a path toward true social and political freedom.

4.2.6.6 Ambedkar's Conversion to Buddhism

Ambedkar's critique of the caste system and his belief that Hinduism was inherently oppressive led him to advocate for the spiritual and social liberation of Dalits through conversion. In 1956, Ambedkar and hundreds of thousands of his followers converted to Buddhism, a religion that he believed was free from the caste hierarchy and offered a path to dignity and equality. Ambedkar's mass conversion was not just a religious act, but a political statement—a rejection of Hinduism and the caste system and a declaration of Dalit autonomy.

Ambedkar's conversion to Buddhism was the culmination of his lifelong struggle for social justice. For Ambedkar, Buddhism represented a religion that embraced compassion, equality and human rights, in stark contrast to the exclusionary practices of Hinduism. Through his conversion, Ambedkar sought to provide Dalits with a new spiritual and moral foundation, free from the oppression of caste. His conversion movement remains a powerful symbol of Dalit resistance and continues to inspire movements for social justice and caste abolition in India today.

B.R. Ambedkar's critique of caste, untouchability and nationalism remains one of the most important contributions to the struggle for social justice in India. His rejection of the caste system, his call for Dalit political autonomy and his radical vision for the annihilation of caste continue to influence Dalit movements and social reform efforts across the country. Ambedkar's intellectual and political legacy serves as a reminder that true freedom cannot be achieved without addressing the structural inequalities embedded in social, religious and political institutions. His work challenges contemporary India to confront the ongoing realities of caste oppression and to strive for a society that upholds equality, dignity and justice for all.

4.2.7 Critique of Dominant Nationalism: G. Aloysius' "Nationalism Without a Nation in India"

In G. Aloysius' work, "Nationalism Without a Nation in India," the author presents a powerful critique of dominant nationalism in India, arguing that the nationalist discourse that

▶ *Challenge to Gandhian Nationalism*

▶ *Liberation of Dalits*

▶ *Conversion to Buddhism*

▶ *Contributions of Ambedkar*

emerged during the Indian independence movement was deeply exclusionary and elite-driven, failing to represent the interests of the marginalised communities, particularly the lower castes, Dalits and Adivasis. Aloysius contends that the nationalist project was largely constructed by the upper-caste elites and it reflected their concerns and aspirations, leaving out the vast majority of the Indian population from the national imagination. This exclusionary nature of Indian nationalism, Aloysius argues, resulted in a form of nationalism without a nation, where the nation-building process neglected to include the very communities that constituted the bulk of India's population.

4.2.7.1. Exclusionary Nature of Dominant Nationalism

One of the central arguments in Aloysius' critique is that dominant Indian nationalism was shaped by the upper-caste, educated elites, particularly the Brahminical class, who sought to create a national identity that mirrored their own cultural values and social structures. This elite-driven nationalism was rooted in the colonial administrative framework and the Brahmanical traditions, which prioritised the interests of the upper castes while marginalising the lower castes, Dalits and tribal communities.

For Aloysius, the Indian National Congress (INC), led predominantly by upper-caste elites like Mahatma Gandhi and Jawaharlal Nehru, propagated a vision of India that reflected their Hindu-centric worldview, which often glossed over the social hierarchies and caste oppression that defined Indian society. This dominant nationalism, according to Aloysius, was incapable of genuinely representing the aspirations and concerns of the subaltern groups—those who had been historically oppressed and excluded from positions of power.

Aloysius argues that the caste system, which structured Indian society along strictly hierarchical lines, was left largely untouched by the nationalist movement, which focused primarily on achieving political independence from British colonial rule. The nationalist leadership, with its upper-caste hegemony, failed to address the social inequalities and caste-based oppression that continued to dominate Indian life. As a result, the nation-building process was inherently exclusionary and the marginalised communities were left outside the national imagination.

4.2.7.2. Nationalism and the Question of Caste

Aloysius' critique is deeply concerned with the caste question and the failure of Indian nationalism to address the social hierarchies

▶ *Critique of Dominant Nationalism in India*

▶ *Elite-driven nationalism*

▶ *Hindu-centric worldview*
▶ *Subaltern exclusion*

▶ *Exclusionary nationalism*
▶ *Social inequality*

▶ Failure of Indian Nationalism

that structured Indian society. He argues that the caste system was one of the most significant obstacles to the creation of a truly inclusive national identity. Despite the presence of leaders like B.R. Ambedkar, who sought to annihilate caste and create a socially just India, the dominant nationalist discourse continued to be shaped by upper-caste interests, which prioritised Hindu unity over social justice.

▶ Call for the annihilation of caste

Aloysius critiques the Gandhian approach to caste, particularly Gandhi's defense of the *varna* system, which Gandhi saw as a division of labour rather than a form of social hierarchy. Aloysius argues that this approach legitimised the existing caste order and prevented any meaningful challenge to the Brahmanical dominance that defined Indian society. In contrast, Ambedkar's call for the annihilation of caste was a radical rejection of the entire social order that had oppressed Dalits and lower castes for centuries.

▶ Vehicle for upper-caste dominance

According to Aloysius, the failure of dominant nationalism to confront the caste system not only excluded Dalits and lower-caste communities from the national project but also reinforced the power dynamics that had existed for centuries. In this sense, Indian nationalism became a vehicle for upper-caste dominance, rather than a movement for true national liberation that would include the most marginalised segments of Indian society.

4.2.7.3. Nation-Building and Marginalised Communities

Aloysius argues that the dominant nationalist narrative constructed a vision of India that was largely disconnected from the realities of marginalised communities. The tribal and lower-caste populations, which constituted a significant portion of the Indian population, were excluded from the nation-building process and were treated as passive recipients of a nationalist vision rather than as active participants in the creation of the nation.

▶ Exclusion of marginalised communities

▶ Nationalism without a nation

For Aloysius, the elite-driven nationalism failed to take into account the local histories and identities of these marginalised groups, which were often dismissed as backward or primitive in the modernist project of Indian nationalism. This failure to recognise the diverse histories and cultures of the Indian population, Aloysius contends, resulted in a form of nationalism without a nation, where the national identity that emerged was not representative of the majority of the Indian people.

Aloysius points out that tribal communities, for example, were often dispossessed of their land and resources in the name of national development, with little regard for their traditional

livelihoods or cultural autonomy. Similarly, lower-caste groups continued to be marginalised in the social hierarchy, with little access to the political and economic power structures that were dominated by upper-caste elites. In this context, nationalism became a means of consolidating the power of the elite classes while leaving the vast majority of the population on the periphery of the national project.

4.2.7.4. Critique of Gandhi and Indian National Congress

Aloysius is particularly critical of the Congress Party and Mahatma Gandhi, who, in his view, failed to offer a radical challenge to the social inequalities that defined Indian society. He argues that Gandhi's focus on nonviolent resistance and religious unity did not address the structural oppression of Dalits, lower castes and tribal communities. While Gandhi's efforts to eradicate untouchability were sincere, they did not go far enough in challenging the caste system itself.

*Failure of INC
and Gandhi*

Aloysius critiques Gandhi's Harijan programme, which sought to uplift Dalits within the framework of Hinduism, arguing that it was paternalistic and failed to empower Dalits to challenge the caste system on their terms. He suggests that Gandhi's insistence on keeping Dalits within the Hindu fold was more about preserving Hindu unity than about achieving social justice for Dalits. This paternalistic approach, according to Aloysius, reinforced the status quo and prevented Dalits from achieving true autonomy.

*Upliftment Dalit
Community*

Similarly, Aloysius criticises the Congress Party for its failure to engage with the demands of lower-caste and tribal leaders, such as B.R. Ambedkar, who sought political representation and social reform. Instead, the Congress Party prioritised the interests of the upper-caste elite, ensuring that the caste hierarchy remained largely intact even after India gained independence. Aloysius argues that this elite-driven nationalist movement ultimately led to the creation of a nation that did not include its most marginalised citizens.

*Elite-driven
nationalist
movement*
Congress's failure

In "Nationalism Without a Nation in India," Aloysius concludes that the dominant form of Indian nationalism was, in many ways, a nationalism without a nation—a nationalist discourse that failed to include the vast majority of the Indian population. While the nationalist movement succeeded in securing political independence from the British, it did not lead to the creation of a truly inclusive nation, as caste hierarchies, tribal marginalisation and social inequalities persisted.

*Exclusionary
nationalism*

Aloysius' critique challenges the romanticised narrative of the Indian nationalist movement, highlighting the exclusionary nature

▶ *Dalit and subaltern studies*

of the elite-driven project and calling for a reimagining of Indian nationalism that includes the voices and experiences of the subaltern groups who have been historically marginalised. His work remains an important contribution to Dalit and Subaltern Studies, offering a critical lens through which to view the incomplete nature of the Indian nation-building process and the ongoing struggles for social justice and equality in postcolonial India.

▶ *Re-examination of Indian nationalism*

In G. Aloysius' work, "Nationalism Without a Nation in India," he provides a scathing critique of the dominant nationalist narrative in India, arguing that it was an exclusionary project driven by upper-caste elites that failed to address the social realities of marginalised communities. His analysis underscores the limitations of Indian nationalism, which, despite achieving political independence, did not create a nation that genuinely represented the lower castes and Dalits. Aloysius' work calls for a re-examination of Indian nationalism, urging scholars and activists to recognise the diverse histories, cultures and experiences that were excluded from the national project and to strive for a more inclusive vision of Indian society.

Summarised Overview

The caste question has played a pivotal role in shaping the discourse around nationalism in India. While leaders like Mahatma Gandhi and B.R. Ambedkar were united in their desire for an independent India, they held significantly different views on the role caste would play in shaping that new nation.

Gandhi's position on caste was influenced by his belief in the *Varna* system, which he saw as a natural and essential aspect of Hindu society. Though he was deeply committed to eradicating untouchability and improving the condition of Dalits (whom he called Harijans), Gandhi did not advocate for the total abolition of the caste system. Instead, he focused on social reform within the existing framework, promoting his anti-untouchability programmes while upholding the *Varna* hierarchy.

In contrast, B.R. Ambedkar had a radical vision of social transformation. He saw caste not as a benign social division but as a tool of oppression and he argued that it needed to be annihilated completely. His work, *Annihilation of Caste*, remains a powerful critique of the caste system and calls for the destruction of this social hierarchy as a prerequisite for any meaningful idea of nationalism. Ambedkar believed that Indian nationalism could not be truly inclusive unless it addressed the deep social inequalities inherent in the caste system.

Ambedkar's critique of dominant nationalism was centred around the idea that the nationalist movement, in its quest for independence from British rule, often ignored the plight of marginalised communities, particularly the Dalits. He believed that nationalism without social justice would perpetuate existing inequalities, leaving large sections of Indian society excluded from the benefits of independence.

The intellectual debates between Gandhi and Ambedkar form a critical part of understanding the intersections of nationalism and the caste question in India. Furthermore, scholars like G Aloysius, in works like "Nationalism Without a Nation in India," argue that the Indian nationalist movement, despite its claims of inclusivity, often failed to represent the true interests of the marginalised. This analysis critiques how dominant forms of nationalism often prioritised the concerns of the upper-caste elites, leaving the oppressed communities to continue their struggle for social justice.

Assignments

1. Analyse the significance of B.R. Ambedkar's critique of the caste system in his work 'Annihilation of Caste'.

2. Analyse the role of untouchability in shaping the nationalist discourse during the freedom struggle.

3. Summarise the significant arguments of G.Aloysius in his work 'Nationalism without a Nation in India'.

4. Compare how both Gandhi and Ambedkar sought to address the issue of Dalit inclusion in the national movement.

5. Write an essay on the impact of caste and untouchability on the Indian nationalist movement, regarding the views of Gandhi, Ambedkar and G.Aloysius.

Suggested Reading

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Social Exclusion and Inclusive Policies

Learning Outcomes

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

- ♦ understand the concept of social exclusion and inequality
- ♦ analyse various forms of social exclusion intersect with different types of inequality, creating complex and layered experiences of marginalisation
- ♦ examine the social exclusion and inclusion policies

Background

The concept of social exclusion refers to the process by which individuals or groups are systematically marginalised from full participation in social, economic and political life. Exclusion manifests itself in various forms—inequality, discrimination and barriers to resources like education, employment and healthcare. Inequality is often the root cause of exclusion, as marginalised groups—whether defined by caste, gender, ethnicity or economic status—are prevented from enjoying the rights and opportunities available to others.

In response to these challenges, inclusive policies are designed to promote social justice by ensuring that all citizens have equal access to opportunities and resources. These policies aim to address the structural inequalities that have historically marginalised certain communities. Central to this framework are constitutional principles that protect the rights of individuals and guarantee equality, justice and equal opportunity.

The Indian Constitution, with its commitment to social justice, has been a powerful tool in addressing exclusion, particularly through affirmative policies like reservations for marginalised groups in education and employment. B.R. Ambedkar, a key architect of the Indian Constitution, was deeply concerned with the issue of social exclusion, especially concerning the caste system. His perspectives on social justice, as outlined in his work and actions, focused on dismantling the barriers that perpetuated exclusion.

In modern times, inclusive higher education policies have become a significant focus, aiming to provide equitable access to education for underrepresented and marginalised

groups. Through financial aid, affirmative action and support services for disabled and economically disadvantaged students, these policies seek to level the playing field and promote equality in academic institutions.

Keywords

Social exclusion, Inequality, Equal opportunity, Social justice, Marginalisation, Discrimination

Discussion

4.3.1 Inequality and Social Exclusion

▶ *Systemic exclusion*

Social exclusion is a multifaceted concept that goes beyond the economic sphere and encompasses political, cultural and spatial dimensions. It refers to the systematic exclusion of individuals or groups from the resources and opportunities that are fundamental for a dignified life, such as access to education, employment, housing, healthcare and political participation. Social exclusion is typically rooted in structural inequalities and is perpetuated by both institutional and informal systems of discrimination.

▶ *Uneven distribution of resources*

Inequality, on the other hand, refers to the uneven distribution of resources and opportunities among different social groups. Inequality can manifest itself in economic disparities, unequal access to social services and the uneven exercise of political power. Inequality often forms the foundation upon which social exclusion is built, reinforcing discriminatory practices and limiting social mobility for marginalised groups.

▶ *Historical exclusion*

In a historical context, social exclusion has taken various forms across different societies. Feudal Europe, with its rigid class structures, institutionalised the exclusion of peasants, women and religious minorities. Similarly, in colonial India, caste, gender and ethnic divisions resulted in severe social and economic exclusion. These exclusions were reinforced by legal frameworks, social norms and cultural practices that continued to perpetuate inequalities over time. Today, modern societies continue to grapple with the legacies of these exclusionary practices.

Social exclusion is not just about poverty or deprivation; it's about being actively excluded from participation in key aspects of

life. It can happen in various spheres—economic, social, political and cultural—and results in long-term disadvantages. For instance, if children in underdeveloped areas of a city are denied access to quality education, they are unlikely to escape the cycle of poverty, as education is one of the primary means of social mobility.

On the other hand, inequality refers to the disparity in the distribution of resources, opportunities and power. Inequality often stems from historical and social factors, such as caste systems, racial hierarchies or gender discrimination. When inequality is deep-rooted and structural, it leads to social exclusion, where entire groups are left out of the social, political and economic benefits enjoyed by others.

Definitions

1. **Social Exclusion:** The process by which certain individuals or groups are systematically denied access to the rights, resources and opportunities necessary for full participation in society. Social exclusion can be the result of formal and informal rules, norms and practices that marginalise certain groups based on class, caste, gender, race, disability or other characteristics.

2. **Inequality:** The unequal distribution of resources, rights and opportunities across different segments of society. Inequality can take various forms, including economic inequality (income and wealth disparities), social inequality (disparities in access to education, healthcare, etc.) and political inequality (disparities in representation and influence).

3. **Structural Inequality:** A form of inequality that is embedded in the institutions and systems that govern society, such as the education system, the labour market and legal frameworks. These inequalities are not accidental but are the result of historical patterns of discrimination and exclusion that continue to persist.

4. **Marginalisation:** The process of relegating certain groups to the periphery of society by excluding them from full participation in social, economic and political life. Marginalised groups often lack the power to challenge the structures that perpetuate their exclusion.

4.3.2 Theories of Social Exclusion

To understand the dynamics of social exclusion, it is crucial to examine the theoretical frameworks that explain why and how exclusion occurs. Social exclusion is closely tied to inequality. Inequality refers to the uneven distribution of resources,

opportunities and rights. When this inequality becomes entrenched and systemic, it fuels exclusion, creating cycles of poverty and marginalisation that can be hard to break. To understand how social exclusion and inequality are perpetuated, it is essential to explore the key theories of social exclusion that scholars have developed.

Several theories provide a conceptual understanding of exclusion, linking it with inequality and societal structures.

4.3.2.1 Structuralist Theory of Social Exclusion

▶ *Theories of Exclusion*

Structuralist theories emphasise that exclusion is built into the fabric of society, particularly through its social, economic and political institutions. This theory argues that exclusion is not just the result of individual actions or prejudices, but a systemic issue embedded within societal structures. The idea here is that society itself is organised in a way that benefits certain groups while marginalising others.

▶ *Systemic issue*

For example, in capitalist societies, economic systems tend to prioritise the interests of those with wealth and power. Wealthy individuals and corporations have greater access to resources and political influence, allowing them to shape policies in their favour. This often leaves the working class and the poor excluded from opportunities for economic advancement. Social institutions like education and healthcare also tend to reflect these disparities, offering better services to the wealthy while providing limited access to marginalised groups.

▶ *Economic exclusion*

The unequal access to education and healthcare between affluent and underdeveloped areas reflects structural exclusion, where the system is designed in a way that privileges some and marginalises others. The structuralist perspective helps explain why certain groups remain perpetually disadvantaged, as the very systems meant to provide opportunity often exclude them.

▶ *Systemic inequality*

4.3.2.2 Relational Theory of Social Exclusion

Relational theories focus on the social relationships between groups and how power dynamics between these groups create exclusion. According to this theory, exclusion is a result of unequal power relations in society. Dominant groups use their power to maintain control over resources, opportunities and social privileges by excluding marginalised groups.

▶ *Power dynamics*

For instance, in societies structured around caste systems, upper-caste groups historically maintained their social and economic dominance by excluding lower-caste groups from land ownership, education and employment opportunities. This relational dynamic

between the dominant and marginalised groups is at the heart of social exclusion in such contexts. The dominant group's control over resources ensures that marginalised groups remain dependent and excluded from full participation in society.

In the context of the earlier illustration, we can see how relational exclusion operates. The privileged groups in the affluent areas can maintain their access to quality services, while the marginalised communities in the underdeveloped parts of the city are excluded from these resources. This is not merely because of individual prejudice but because the dominant group has structured society in a way that keeps the marginalised at a disadvantage.

4.3.2.3 Economic and Cultural Theory of Social Exclusion

Economic and cultural theories explore how exclusion is driven by both material conditions and cultural discrimination. Economic exclusion refers to the denial of access to resources such as income, employment and financial services. When certain groups are excluded from participating in the economy, they are unable to secure the resources necessary for a decent standard of living. This form of exclusion is often self-perpetuating, as economic deprivation leads to further marginalisation.

For example, individuals who are denied employment due to discriminatory hiring practices are likely to fall into poverty, which in turn limits their ability to access education, healthcare and housing. The economic exclusion they experience often reinforces their social exclusion, creating a vicious cycle of marginalisation.

Cultural exclusion occurs when certain groups are marginalised based on cultural factors such as race, ethnicity or religion. Cultural exclusion often manifests through discrimination and stigma. Minority ethnic or religious groups may be denied access to public services, face barriers to social integration or suffer from negative stereotypes that limit their participation in society.

In the earlier example, the cultural exclusion of ethnic or religious minorities living in slums could further compound their economic exclusion, as they may face additional barriers to employment or education due to prejudice. Thus, both economic and cultural factors work together to reinforce exclusion.

These three theories—structuralist, relational and economic and cultural—help explain how social exclusion is perpetuated in societies. They highlight the complex interplay between economic conditions, power relations and cultural norms that contribute

to the marginalisation of certain groups. By understanding these theoretical frameworks, learners can better grasp the underlying causes of exclusion and how society can work toward greater inclusion.

4.3.3 Social Exclusion and Inequality: Key Intersections

Various forms of social exclusion intersect with different types of inequality, creating complex and layered experiences of marginalisation.

Example of cultural exclusion

4.3.3.1 Caste and Social Exclusion

In the Indian context, the caste system has historically been one of the most entrenched systems of social exclusion. Dalits (formerly known as "untouchables") and other lower-caste groups have been systematically excluded from access to land, education and political power. The exclusion of Dalits is not merely economic but also social and cultural, as they face discrimination in all aspects of life, from access to public spaces to inter-caste marriages.

Caste discrimination

4.3.3.2 Gender and Social Exclusion

Gender inequality is a key driver of social exclusion, particularly for women in patriarchal societies. Women are often excluded from economic opportunities, political participation and social rights. Gender-based exclusion intersects with other forms of exclusion, such as caste, class and ethnicity, to create compounded disadvantages for women. For example, Dalit women in India face both caste-based and gender-based exclusion, limiting their access to education, healthcare and employment.

Gender exclusion

4.3.3.3 Racial and Ethnic Inequality

Race and ethnicity play a significant role in social exclusion, particularly in multicultural societies. In the United States, African Americans and other minority groups have historically faced exclusion from economic, social and political life due to systemic racism. This exclusion has led to persistent racial disparities in income, education and health outcomes.

Racial exclusion

4.3.3.4 Disability and Social Exclusion

People with disabilities often experience exclusion from mainstream society due to physical, social and attitudinal barriers. Accessibility to public spaces, education and employment remains a significant challenge for individuals with disabilities. Inclusive policies aimed at improving accessibility and challenging societal attitudes towards disability are essential for reducing this form of exclusion.

Disability exclusion

4.3.3.5 LGBTQ+ Exclusion

The exclusion of LGBTQ+ individuals is a form of social exclusion that is rooted in both cultural and legal discrimination. LGBTQ+ individuals often face exclusion from family structures, religious institutions and legal protections. In many countries, LGBTQ+ individuals are denied the right to marry, adopt children and access healthcare services. This exclusion leads to higher rates of mental health issues, homelessness and unemployment among LGBTQ+ populations.

4.3.4 Inclusive Policies to Combat Social Exclusion

To address the multifaceted nature of social exclusion, governments and international organisations have developed a range of inclusive policies aimed at promoting equality and social integration.

One of the most well-known inclusive policies is affirmative action, which seeks to improve access to education, employment and political participation for historically marginalised groups. In India, the system of reservations ensures that a certain percentage of government jobs, educational seats and political offices are reserved for Scheduled Castes, Scheduled Tribes and Other Backward Classes. This policy aims to rectify historical injustices and provide equal opportunities for marginalised groups.

Social welfare programs are designed to provide economic support to marginalised groups, reducing the economic inequalities that contribute to social exclusion. Programmes such as unemployment benefits, food security schemes and universal healthcare aim to improve the living conditions of the poor and vulnerable. For example, Brazil's Bolsa Família programme provides cash transfers to low-income families, conditional on their children attending school and receiving vaccinations.

Education is one of the most powerful tools for reducing social exclusion, as it provides individuals with the skills and knowledge necessary to participate fully in society. Inclusive education policies, such as free primary education, scholarships for marginalised groups and anti-discrimination laws in schools, help to ensure that all individuals have access to quality education. In India, the Right to Education Act guarantees free and compulsory education for children aged 6 to 14, with special provisions for marginalised groups.

Legal protections are essential for safeguarding the rights of excluded groups and promoting social inclusion. Anti-

LGBTQ+ exclusion

Inclusive policies

Affirmative action and reservations

Social welfare programmes

Education policies

discrimination laws, human rights conventions and international treaties provide the legal framework for protecting the rights of marginalised communities. For example, the United Nations Convention on the Rights of Persons with Disabilities (CRPD) promotes the rights of individuals with disabilities and obligates signatory countries to implement inclusive policies.

Countries around the world have implemented various policies to combat social exclusion. In South Africa, the post-apartheid government introduced affirmative action policies aimed at increasing the representation of black South Africans in education, employment and political life. In Brazil, the Bolsa Família programme has been credited with reducing poverty and improving social inclusion by providing financial support to low-income families.

*► Global
examples of
inclusive policies*

4.3.5 Social Exclusion and Inclusion Policies

The exclusion of Dalits in India has been a longstanding issue, rooted in the caste system. Historically, Dalits were denied access to education, land and political power and were subjected to untouchability practices. In response, the Indian government has implemented a range of policies aimed at addressing caste-based exclusion. These policies include the reservation system, which ensures that a certain percentage of government jobs, educational seats and political offices are reserved for Dalits and other marginalised groups. Additionally, the government has introduced welfare programmes aimed at improving the socio-economic conditions of Dalits, such as the Scheduled Castes Sub-Plan, which allocates funds for the development of Dalit communities.

*► India: caste-based
exclusion*

In many developing countries, girls face significant barriers to education due to socio-economic factors, cultural norms and discriminatory practices. For example, in rural India, girls are often expected to prioritise household chores and caregiving over education, leading to high dropout rates. To address this issue, the Indian government has implemented policies such as the Beti Bachao Beti Padhao (Save the Girl Child, Educate the Girl Child) campaign, which aims to improve access to education for girls and challenge gender-based discrimination.

*► Gender exclusion
in education*

Indigenous communities in Latin America have historically been excluded from access to land, education and political representation. In countries such as Bolivia and Ecuador, indigenous populations have been marginalised by colonial practices and discriminatory policies. In response, governments in these countries have introduced inclusive policies aimed at promoting the rights of indigenous communities. For example, Bolivia's 2009 Constitution

*► Indigenous
exclusion in Latin
America*

recognises the rights of indigenous peoples to self-governance and provides for the protection of indigenous languages and cultures.

Urban exclusion in slums

In many cities around the world, slum dwellers face exclusion from access to basic services such as clean water, sanitation, healthcare and education. Slum populations are often excluded from formal employment and political participation, leading to a cycle of poverty and marginalisation. To address this issue, governments and international organisations have implemented policies aimed at improving living conditions in slums and promoting social inclusion. For example, India's Jawaharlal Nehru National Urban Renewal Mission (JNNURM) focuses on improving urban infrastructure and providing affordable housing for slum dwellers.

4.3.6 Challenges in Implementing Inclusive Policies

While inclusive policies are essential for addressing social exclusion, their implementation is often hindered by various challenges.

Political resistance

In many cases, inclusive policies face resistance from dominant groups who perceive these policies as a threat to their social and economic power. For example, affirmative action policies in India have been met with opposition from upper-caste groups, who argue that these policies discriminate against them.

Economic constraints

Implementing inclusive policies requires significant financial resources, which may be limited in developing countries. Social welfare programmes, in particular, require sustained funding to be effective. In times of economic crisis, governments may prioritise other areas of spending over social inclusion programmes.

Cultural and social barriers

Deep-rooted cultural norms and social attitudes can impede the success of inclusive policies. For example, in patriarchal societies, gender-based exclusion may persist despite legal protections for women's rights. Similarly, caste-based discrimination may continue in practice, even if it is prohibited by law.

Monitoring and accountability

The effectiveness of inclusive policies depends on robust monitoring and evaluation mechanisms. Without proper accountability frameworks, inclusive policies may not achieve their intended outcomes. For example, corruption and inefficiency in the implementation of social welfare programs can undermine their impact.

Social exclusion and inequality are deeply intertwined phenomena that require comprehensive and sustained efforts to

▶ *Inclusive policies*

▶ *Constitutional Principles*

▶ *Constitutional principle of Wequality*

▶ *Definition of equality*

▶ *Equality in the Indian Constitution*

address. Inclusive policies, such as affirmative action, social welfare programmes and legal protections, play a crucial role in promoting social integration and reducing inequality. However, the success of these policies depends on overcoming political, economic and cultural barriers to their implementation. As societies continue to grapple with the legacies of exclusionary practices, it is essential to remain committed to the principles of equality and social justice.

4.3.7 Constitutional Principles of Equality, Justice and Equal Opportunity

Constitutions around the world serve as the foundational legal frameworks that guarantee the rights of individuals and establish the principles of justice and equality within a state. The concepts of equality, justice and equal opportunity are central to ensuring that all citizens have fair access to resources, opportunities and protections under the law, irrespective of their social, economic or cultural backgrounds. In modern democratic societies, these constitutional principles aim to protect individuals from discrimination and ensure that every citizen can participate fully in civic life.

The following sections will explore the constitutional provisions related to equality, justice and equal opportunity, with examples drawn from notable constitutions, including the Indian Constitution, which has one of the most comprehensive frameworks for ensuring these rights.

Equality in constitutional terms refers to the idea that all individuals are entitled to the same treatment under the law, regardless of their characteristics such as gender, race, caste, religion, or economic status. Constitutional equality ensures that the government treats all citizens fairly and that laws apply equally to everyone. In its essence, equality involves both formal equality, where the law applies equally to all individuals and substantive equality, which addresses structural inequalities by ensuring that disadvantaged groups receive the support necessary to achieve true equality.

The Indian Constitution is an example of how constitutional principles can be designed to promote equality. Article 14 of the Constitution guarantees the Right to Equality, ensuring that every individual is equal before the law and has the right to equal protection of the laws. This means that the government cannot discriminate against any individual or group. In addition to Article 14, the Indian Constitution includes Articles 15 and 16, which prohibit discrimination on the grounds of religion, race, caste, sex, or place of birth. Article 15 explicitly prohibits discrimination by the state in public spaces, while Article 16 focuses on equality in matters of public employment, ensuring that citizens have equal access to jobs

and promotions in government services.

While formal equality ensures that laws apply uniformly to everyone, substantive equality aims to address deeper inequalities that exist due to historical and social disadvantages. Substantive equality often involves affirmative actions such as reservations or quotas to provide historically marginalised communities, such as Scheduled Castes (SC), Scheduled Tribes (ST) and Other Backward Classes (OBC), with better access to education, employment and political representation. In India, the policy of reservations is designed to correct centuries of caste-based discrimination and exclusion by providing marginalised groups with opportunities they would otherwise be denied due to systemic inequality. Thus, substantive equality aims to achieve social justice, which goes beyond merely treating everyone the same and instead ensures that those who are disadvantaged receive the support necessary to compete on equal terms.

▶ Formal vs. Substantive equality

4.3.7.1 Constitutional Principle of Justice

Justice is a fundamental constitutional principle that seeks to ensure fairness in the treatment of individuals and the allocation of rights and resources. Constitutional justice is concerned with both distributive justice (the fair allocation of resources and opportunities) and legal justice (the application of the law fairly and impartially). The principle of justice ensures that no individual or group is unfairly treated by the law and that marginalised and vulnerable populations receive protection against exploitation, discrimination and oppression.

▶ Definition of Justice

The Indian Constitution enshrines the principle of justice through its Preamble, which explicitly mentions the state's commitment to providing social, economic and political justice to all its citizens. These three dimensions of justice are intended to ensure that individuals are treated fairly in all aspects of life— social justice through the removal of social hierarchies like caste, economic justice through equal opportunities for wealth and income distribution and political justice through equal participation of all citizens in governance. Article 38 of the Directive Principles of State Policy (DPSP) emphasises that the state must strive to promote the welfare of the people by securing and protecting a social order in which justice—social, economic and political—is the cornerstone. This broad commitment means that the government is tasked with ensuring fair access to resources like healthcare, education and employment and that laws must be enforced without discrimination.

▶ Justice in the Indian Constitution

Social justice focuses on eradicating the deep-rooted inequalities that are often entrenched in society due to factors like caste, race, gender and religion. The Constitution provides for mechanisms like affirmative action and positive discrimination (e.g., reservations for SCs, STs and OBCs) to ensure that disadvantaged groups can participate on an equal footing with others. Economic justice aims to ensure that all citizens have fair access to economic opportunities and resources. The state is constitutionally obligated to ensure equitable distribution of wealth and to protect the rights of workers. Articles 39(b) and (c) of the Constitution focus on the fair distribution of material resources and the prevention of economic concentration in the hands of a few.

▶ *Social and economic justice*

4.3.7.2 Constitutional Principle of Equal Opportunity

Equal opportunity refers to the principle that all individuals should have the same chances to succeed, regardless of their background. In constitutional terms, it means that the state should provide a level playing field for all citizens, allowing them to compete fairly in all aspects of life—education, employment and public service.

▶ *Definition of equal opportunity*

Article 16 of the Indian Constitution explicitly guarantees equal opportunity in matters of public employment. This ensures that all citizens have the right to compete for government jobs on an equal footing. Any form of discrimination based on caste, religion, gender, or place of birth is prohibited in public sector recruitment.

▶ *Equal opportunity in public employment*

To further promote equal opportunity, the state provides for reservations and special provisions for marginalised communities, as mentioned earlier. For example, in India, job quotas are reserved for SCs, STs and OBCs to ensure that these communities, historically denied access to public employment, are given a fair chance to succeed in government jobs.

Education is one of the primary tools for ensuring equal opportunity. The Right to Education (RTE) Act, based on Article 21A of the Indian Constitution, guarantees free and compulsory education to all children aged 6-14 years. This provision is crucial for ensuring that all children, regardless of their socio-economic background, have access to quality education—a key stepping stone for equal opportunity in employment and personal development.

▶ *Education as a means of ensuring equal opportunity*

4.3.8 The Role of Affirmative Action in Promoting Equal Opportunity

Affirmative action is one of the most important tools for promoting equal opportunity. By providing preferential treatment

to disadvantaged groups, affirmative action aims to correct the historical injustices that have denied these groups equal access to opportunities. The reservation system in India, which reserves a certain percentage of seats in educational institutions and jobs for SCs, STs and OBCs, is an example of affirmative action in practice. While affirmative action remains a contentious issue, its role in promoting equal opportunity for historically marginalised groups cannot be overstated. It helps level the playing field, ensuring that all citizens—regardless of their caste, gender, or background—have a fair shot at success.

The constitutional principles of equality, justice and equal opportunity form the bedrock of a fair and just society. They ensure that individuals are treated equally under the law, that justice is served in a manner that is fair and impartial and that all citizens have access to the same opportunities for success, regardless of their background. In the Indian context, the Constitution provides comprehensive protections and safeguards to ensure these principles are upheld. Through provisions such as Article 14 (Right to Equality), Article 16 (Equal Opportunity in Public Employment) and the Preamble's commitment to justice, the Indian state seeks to eradicate inequality and promote social harmony.

However, the practical implementation of these principles continues to face challenges, as structural inequalities persist in many areas. Nonetheless, the Constitution remains a powerful tool for addressing these inequalities and ensuring that the ideals of equality, justice and equal opportunity are realised for all.

4.3.9 Social Justice and Affirmative Policies: B R Ambedkar's Perspectives on Social Exclusion and Inclusive Policies

The concept of social justice and affirmative policies in India is inextricably linked to the works and philosophy of Dr B.R. Ambedkar, one of the most influential social reformers and thinkers in Indian history. As the chief architect of the Indian Constitution, Ambedkar's ideas on social justice were shaped by his personal experiences of caste-based discrimination and exclusion. He dedicated his life to fighting against the oppressive caste system and advocating for the rights of marginalised communities, particularly the Dalits. Ambedkar believed that for true democracy and social justice to prevail, affirmative policies were essential to uplift those who had been historically disadvantaged and excluded from social, economic and political life. His views on social exclusion and inclusive policies continue to serve as the foundation for India's affirmative action programs today.

B R Ambedkar's Understanding of Social Exclusion

Dr. B.R. Ambedkar's concept of social exclusion primarily centred around the caste system, which he described as a deeply entrenched form of systematic inequality. According to Ambedkar, the caste system was not only a division of labour but a division of labourers that relegated certain groups, particularly the Dalits, to the lowest social and economic strata. This exclusion was enforced through cultural, social and religious practices that denied basic human rights and dignity to Dalits and other lower-caste groups. Ambedkar argued that the caste system's rigid hierarchy was a form of institutionalised exclusion, which prevented marginalised communities from accessing education, employment and political representation. He believed that caste-based exclusion was not just an economic issue but also a profound moral and social problem that needed to be addressed through systemic reforms.

▶ *Social exclusion in the context of caste*

Ambedkar was a strong critic of the Hindu social order, which he believed was the root cause of social exclusion in India. He argued that the caste system, as justified by religious texts like the *Manusmriti*, had legitimised the oppression of lower castes for centuries. This religious sanction of inequality, in his view, made it almost impossible for lower-caste individuals to escape the confines of their social status. Ambedkar's critique was not only aimed at the Brahminical orthodoxy but also the wider societal acceptance of caste-based discrimination. He believed that social exclusion was deeply embedded in the religious and cultural ethos of Indian society, making it difficult to dismantle without radical changes in both social attitudes and political structures.

▶ *Ambedkar's critique of Hindu social order*

Ambedkar's Vision of Social Justice

For Ambedkar, the concept of social justice was about creating an equal society where all individuals, irrespective of their caste, religion, or gender, had the same opportunities for growth and development. Social justice, in Ambedkar's view, was not just about economic redistribution but also about eradicating social hierarchies that perpetuated exclusion. When drafting the Indian Constitution, Ambedkar ensured that social justice was enshrined as a core principle. The Preamble to the Constitution speaks of securing justice—social, economic and political—for all citizens, reflecting Ambedkar's vision of a just and equitable society. Article 17, which abolishes untouchability and Article 15, which prohibits discrimination on the grounds of religion, race, caste, sex, or place of birth, are direct reflections of Ambedkar's commitment to social justice. These provisions aimed to address the historical injustices suffered by Dalits and other marginalised groups, promoting inclusivity and equality before the law.

▶ *Social justice as a constitutional goal*

Ambedkar's Concept of Liberty, Equality and Fraternity

Ambedkar's philosophy of social justice was rooted in the interrelated concepts of liberty, equality and fraternity. He believed that these principles were essential for creating a democratic society free from the shackles of caste and social exclusion.

♦ **Liberty**: Ambedkar emphasised the need for individual freedom, arguing that without liberty, individuals could not develop their capacities and contribute to society. However, liberty alone was insufficient without equality.

♦ **Equality**: For Ambedkar, equality was both a moral and constitutional imperative. He argued that social justice could not be achieved unless all individuals were treated equally under the law and had equal access to resources and opportunities.

♦ **Fraternity**: Ambedkar believed that the sense of fraternity, or brotherhood, was essential for building a cohesive society. Fraternity would foster social solidarity, helping to dismantle the social divisions created by the caste system.

Affirmative Policies and Ambedkar's Legacy

One of the most significant contributions of Ambedkar to Indian society is the introduction of affirmative policies, particularly the reservation system. Ambedkar believed that without proactive state intervention, it would be impossible to uplift the marginalised communities who had been historically excluded from mainstream society. The reservation system, which reserves a percentage of government jobs, educational seats and political offices for Scheduled Castes (SCs), Scheduled Tribes (STs) and Other Backward Classes (OBCs), is one of the key instruments of social justice in India. The goal of the reservation system is to provide substantive equality—a concept Ambedkar strongly advocated for. While formal equality treats everyone the same, substantive equality recognises that historically disadvantaged groups need extra support to compete on an equal footing with others. Ambedkar's philosophy of affirmative action was not just about economic redistribution but about creating conditions where marginalised groups could participate in the democratic process and contribute to the nation's development. He viewed affirmative policies as a temporary measure that would eventually create a level playing field for all citizens.

Concepts of liberty, equality and fraternity

Reservation system as affirmative action

Ambedkar believed that education was the key to breaking the cycle of social exclusion. He emphasised that only through education could the oppressed classes achieve economic independence, self-respect and dignity. Ambedkar himself was a testament to the transformative power of education, having risen from the ranks of the untouchable caste to become one of the most educated and influential figures in Indian history. To promote educational opportunities for marginalised communities, Ambedkar advocated for educational reservations in universities and government schools. He believed that providing access to quality education would enable Dalits and other backward communities to challenge the caste system and achieve social mobility.

▶ *Education as a tool for social empowerment*

Dr. B.R. Ambedkar's contributions to the principles of social justice and affirmative policies have had a profound impact on shaping modern India. His fight against the caste system and his vision of an inclusive society laid the groundwork for many of the affirmative action policies that exist today. By advocating for reservations, educational access and the abolition of untouchability, Ambedkar aimed to create a society where every individual, regardless of caste, religion, or gender, had equal access to opportunities and dignity. Ambedkar's legacy continues to influence India's policies on social exclusion and inclusive governance, as the nation strives to uphold the constitutional values of equality, liberty and fraternity. His belief that affirmative action is essential for achieving substantive equality remains relevant as marginalised groups continue to face social and economic barriers.

▶ *Advocated for inclusive society*

4.3.10 Inclusive Higher Education and Inclusive Policies

In the context of modern education systems, inclusive higher education refers to the practice of ensuring that all individuals, regardless of their socio-economic, cultural, physical, or intellectual backgrounds, have equitable access to educational opportunities at the university level. It is founded on the principle that diversity should be celebrated and every student should have an equal chance to succeed in higher education. This approach seeks to address historical inequalities and remove barriers that prevent marginalised groups from participating fully in the academic community.

▶ *Equitable access to all individuals*

Inclusive policies in education are those that actively work toward creating an environment that accommodates diverse learners. These policies aim to ensure not only access but also success for all students, with particular attention to groups who have been traditionally underrepresented in higher education, such as students from disadvantaged socio-economic backgrounds, students with disabilities and ethnic minorities.

▶ *Focus on underrepresented groups*

4.3.10.1 The Importance of Inclusive Higher Education

▶ *Social equity and justice*

One of the primary reasons for promoting inclusive higher education is to achieve social equity and justice. Higher education has the potential to act as a great equaliser, providing individuals with the skills, knowledge and qualifications needed to improve their socio-economic conditions. However, for this potential to be realised, access to higher education must be broadened to include traditionally marginalised groups. Historically, access to higher education has been limited to privileged segments of society, leaving behind marginalised groups such as the economically disadvantaged, ethnic minorities and individuals with disabilities. Inclusive higher education seeks to dismantle these barriers by promoting equitable access for all. This approach not only benefits individuals but also strengthens society by fostering diversity, innovation and social cohesion.

▶ *Economic growth and development*

In addition to promoting social equity, inclusive higher education contributes to economic growth and development. By expanding access to higher education, societies can tap into the potential of a broader range of talents, leading to a more skilled and diverse workforce. Inclusive education can lead to higher productivity and innovation, as it draws from the varied experiences and perspectives of individuals from different backgrounds. Furthermore, inclusive higher education can help reduce economic disparities by enabling individuals from marginalised groups to improve their employment prospects and earning potential. In the long run, this contributes to reducing poverty and promoting upward social mobility.

4.3.10.2 Barriers to Inclusive Higher Education

▶ *Socio-economic barriers*

One of the biggest challenges to inclusive higher education is the socio-economic barriers that many students face. Students from low-income families often struggle to afford tuition fees, books and other related expenses. In addition, they may lack access to the necessary resources, such as technology and internet connectivity, which can hinder their ability to participate fully in higher education. This financial burden often forces students to drop out or prevents them from pursuing higher education altogether.

▶ *Cultural and social barriers*

Cultural and social barriers also play a significant role in limiting access to higher education. In many societies, certain ethnic or social groups may not value or prioritise higher education due to historical exclusion or cultural practices. For example, in some communities, women or members of marginalised castes may face resistance from their families or communities when pursuing higher education. These cultural barriers often result in lower enrollment rates and higher dropout rates for these groups.

Students with disabilities often face significant physical and intellectual barriers to accessing higher education. For instance, university campuses and facilities may not be adequately equipped to accommodate students with physical disabilities and there may be a lack of accessible materials or technologies for students with visual or hearing impairments. Additionally, students with intellectual or learning disabilities may face challenges in accessing appropriate support services, such as tutoring or counselling. These barriers can prevent students with disabilities from fully participating in higher education and achieving their academic potential.

Physical and intellectual barriers

4.3.10.3 Inclusive Policies in Higher Education

One of the most prominent inclusive policies in higher education is affirmative action. In many countries, affirmative action policies aim to provide opportunities for students from marginalised groups by reserving a percentage of seats in universities for them. In India, for example, the reservation system reserves seats for Scheduled Castes (SCs), Scheduled Tribes (STs) and Other Backward Classes (OBCs) in higher education institutions. These policies are designed to correct historical injustices and ensure that marginalised groups have equal access to educational opportunities. Affirmative action has played a crucial role in increasing the representation of disadvantaged groups in higher education, but it also faces criticism for potentially fostering division and reducing meritocracy. Nonetheless, it remains an important tool for promoting social inclusion in higher education.

Affirmative action and reservation policies

Financial aid and scholarship programs are vital components of inclusive policies in higher education. These programs provide financial support to students from low-income families, enabling them to afford tuition and other educational expenses. Many governments, universities and non-profit organisations offer scholarships specifically targeted at marginalised groups, including women, ethnic minorities and students with disabilities. By providing financial assistance, these policies help to level the playing field, ensuring that students from all backgrounds can access higher education without being limited by their economic circumstances.

Financial Aid and Scholarships

To promote inclusive higher education for students with disabilities, many universities have established disability support services. These services aim to provide accommodations that make university life more accessible for students with physical, sensory, or intellectual disabilities. Examples include providing accessible classrooms, offering assistive technologies and ensuring that course materials are available in formats suitable for students with visual or hearing impairments. In addition, universities may offer specialised

Disability support services

tutoring, counselling and mentoring services to help students with disabilities navigate the challenges of higher education. These support services are essential for creating an inclusive learning environment where all students can thrive.

4.3.10.4 Inclusive Curriculum and Pedagogy

An important aspect of promoting inclusion in higher education is ensuring that the curriculum and teaching methods are designed to accommodate diverse learners. Inclusive pedagogy focuses on creating learning environments that recognise and respect students' diverse backgrounds and learning needs. This includes using a variety of teaching methods, such as visual aids, interactive learning and group discussions, to engage students with different learning styles. In addition, universities can promote inclusion by incorporating diverse perspectives into the curriculum. This may involve including the histories, cultures and experiences of marginalised groups in the syllabus, which can help students feel represented and valued in the academic community.

India's reservation system is one of the most well-known examples of inclusive policies in higher education. By reserving a percentage of seats in universities for SCs, STs and OBCs, the policy aims to provide educational opportunities for historically marginalised groups who have faced centuries of exclusion under the caste system. While the reservation system has been successful in increasing the representation of these groups in higher education, it has also sparked debates about meritocracy and reverse discrimination. Nonetheless, the policy remains a critical tool for addressing historical inequalities in Indian society and promoting greater social mobility.

In the United States, affirmative action policies have been implemented to promote diversity in higher education, particularly for African Americans, Hispanics and other minority groups. These policies involve considering race, ethnicity and socio-economic background as factors in university admissions to ensure that underrepresented groups have access to higher education. While affirmative action in the U.S. has led to increased diversity in colleges and universities, it has also been a subject of legal and political controversy, with opponents arguing that it undermines merit-based admissions. Despite these challenges, affirmative action continues to play an important role in promoting inclusivity in American higher education.

4.3.10.5 Challenges in Implementing Inclusive Higher Education Policies

One of the main challenges in implementing inclusive higher education policies is the resistance that often comes from privileged

▶ Accommodate diverse learners

▶ India's reservation system

▶ The United States' affirmative action policies

▶ *Resistance to change*

groups who perceive these policies as a threat to their opportunities. For example, affirmative action and reservation policies are frequently criticised for promoting reverse discrimination and lowering academic standards. This resistance can create political and social obstacles to the successful implementation of inclusive policies.

▶ *Lack of resources*

Ensuring that higher education is truly inclusive requires substantial financial and institutional resources. Many universities, particularly in developing countries, may lack the funds to provide the necessary support services for marginalised students, such as disability accommodations, financial aid, or counselling services. This lack of resources can hinder the effectiveness of inclusive policies and prevent them from reaching their full potential.

▶ *Institutional barriers*

In some cases, institutional barriers such as rigid admission criteria or lack of flexibility in course structures can prevent marginalised students from accessing higher education. For example, students from disadvantaged backgrounds may not have the academic qualifications required for admission due to unequal access to quality primary and secondary education. Overcoming these barriers requires a holistic approach that addresses inequality at all levels of the education system. Inclusive higher education is essential for building a just and equitable society where all individuals, regardless of their background, have the opportunity to succeed. Through policies such as affirmative action, financial aid and disability support services, universities and governments can work to dismantle the barriers that have historically excluded marginalised groups from higher education.

Social Media as a Space for Activism and Visibility

The advent of social media has opened new channels for marginalised communities, particularly those affected by caste-based discrimination, to voice their experiences and demand justice. Platforms such as Twitter, Facebook and Instagram have provided an opportunity for Dalits, Adivasis and other socially excluded groups to publicise instances of discrimination and mobilise for social change. The rise of digital activism, such as the Dalit Lives Matter movement, is a testament to how social media can challenge hegemonic caste structures by amplifying the voices of those who have traditionally been silenced by mainstream discourse (Kureel, 2021). These digital platforms enable the rapid dissemination of information, allowing activists to connect across geographic divides, share stories of oppression and galvanise support for anti-caste initiatives.

In addition to raising awareness about caste-related issues, social media serves as a platform for solidarity, where individuals from different caste backgrounds can express support for marginalised groups. Through hashtags, campaigns and viral content, social media has become a tool for fostering a sense of collective identity and resistance against caste-based social exclusion. This democratisation of information allows for a multiplicity of perspectives, highlighting the lived realities of caste oppression and encouraging broader social movements aimed at dismantling discriminatory practices.

Media Narratives

However, the role of media in shaping perceptions of caste and social exclusion is not without its complexities. While social media provides a platform for marginalised voices, it also offers space for the reinforcement of caste-based prejudices. The anonymity provided by digital platforms often emboldens individuals to perpetuate discriminatory ideas under the guise of free speech, contributing to the spread of casteist narratives. Studies show that, while some social media users actively challenge casteism, others propagate harmful ideologies, reinforcing traditional caste hierarchies through hateful speech and discriminatory content(Vijayaraghavan, 2024).

Mainstream media, too, plays a significant role in constructing public perceptions of caste. News outlets, both traditional and digital, are instrumental in framing caste-related issues, often shaping the political and social discourse surrounding caste-based violence, discrimination and marginalisation. While some media institutions highlight systemic inequalities and advocate for social reform, others may inadvertently perpetuate casteist ideologies through biased reporting or the underrepresentation of Dalit voices. The framing of caste-related issues in the media, particularly in sensationalist or polarised contexts, can influence public attitudes and contribute to the normalisation of caste-based discrimination. This is particularly evident in the portrayal of Dalits as victims of violence or as subjects of pity, which can further entrench stereotypes and limit the scope for more nuanced, empowering narratives (Pranjali Kureel, 2021) (Vijayaraghavan, 2024).

Technology in Counteracting Casteism

Despite the democratising potential of digital platforms, technology has proven ambivalent in its ability to address caste-based exclusion. On one hand, the rapid dissemination of caste-related news and stories across digital platforms facilitates public engagement and increases accountability, empowering individuals to hold institutions and individuals accountable for caste-based discrimination. Conversely, the same platforms also enable the circulation of casteist content, particularly in spaces where anonymity shields users from repercussions. The rise of online hate speech, particularly on platforms like Facebook and Twitter, underscores the difficulties in moderating and curbing casteist narratives. In this context, the potential of social

media to both challenge and sustain caste-based exclusion reflects the complexities of the digital age.

Researchers have explored innovative approaches to addressing digital casteism, particularly through the use of natural language processing (NLP) and machine learning algorithms. By aggregating caste-related content from both traditional media sources and social media platforms, scholars have developed automated systems to track and analyse caste-specific narratives. Such initiatives, like the CENSOR (CastE-related NarrativeS cORpus) project, seek to map divergent value judgments expressed in user-generated comments and news stories, identifying both supportive and hostile narratives. These projects aim to generate counter-narratives to combat casteist discourse, offering a potential avenue for the proactive challenge of digital casteism (Vijayaraghavan,2024).

However, the task of identifying and moderating caste-based hate speech remains fraught with challenges. Automated tools often struggle to discern context, particularly when casteist expressions are disguised or encoded through euphemistic language. Moreover, the subjective nature of value judgments in caste-related discussions complicates the development of effective moderation strategies. While NLP models can classify sentiment and detect certain forms of discrimination, the inherent complexity of caste-related discourse requires a more nuanced understanding of context and intent. Thus, while technology holds promise for curbing digital casteism, it remains a work in progress, requiring continuous refinement to address the intricacies of caste-based language.

Technology in Education and Social Reform

In the realm of education, technology has the potential to both challenge caste-based exclusion and perpetuate existing inequalities. Online learning platforms, digital classrooms, and e-learning tools offer new opportunities for students from marginalized castes to access educational resources that were previously unavailable to them due to socio-economic barriers. The growing reach of digital education has the potential to democratise knowledge, enabling individuals from Dalit, Adivasi, and Other Backward Class (OBC) communities to access quality education, thereby reducing disparities and fostering greater social mobility.

Nevertheless, the digital divide remains a significant obstacle to the equitable access of educational technology. Disparities in internet access, digital literacy, and infrastructural support mean that marginalized communities are often unable to fully benefit from the opportunities offered by online learning platforms. Consequently, while technology holds the potential to reduce educational exclusions, it is essential to address the underlying structural inequalities that prevent its equitable distribution.

Summarised Overview

Social exclusion occurs when individuals or groups are systematically marginalised, and denied access to opportunities, resources and rights that others in society take for granted. It affects various aspects of life—education, employment, healthcare and political participation—and is often rooted in deep-seated inequalities based on factors such as caste, gender, economic status and disability. Addressing these challenges requires a commitment to inclusive policies that aim to rectify these structural inequalities. The Indian Constitution provides a strong legal framework for promoting equality, justice and equal opportunity. Articles such as Article 14 (Right to Equality) and Article 15 (Prohibition of Discrimination) underscore the state's responsibility to protect the rights of all citizens, particularly those who have been historically marginalised. Furthermore, the Directive Principles of State Policy emphasise the role of the state in promoting the welfare of its citizens, ensuring that social justice remains a guiding principle in governance.

B.R. Ambedkar's contributions to the discourse on social exclusion and affirmative policies are foundational to understanding modern India's approach to social justice. As a fierce critic of the caste system, Ambedkar advocated for the annihilation of caste and was instrumental in developing affirmative action policies, such as reservations in education and public employment, to uplift marginalised communities. His vision of a just society extended beyond mere legal reforms; he believed in the empowerment of Dalits and other oppressed groups through education, political participation and economic independence.

One of the most critical areas where inclusive policies have made a significant impact is higher education. Ensuring that underprivileged groups have access to higher education is a vital step toward promoting social mobility and reducing economic inequality. Inclusive higher education policies include reservations, scholarships and support services for students from disadvantaged backgrounds. These policies help bridge the gap between privileged and marginalised students, ensuring that all individuals have a fair chance to succeed academically and professionally. While these efforts have made significant strides in promoting social inclusion, challenges remain. Resistance to affirmative action policies, underfunded support programs and deep-rooted social attitudes continue to hinder progress. Nevertheless, the commitment to inclusive policies remains a vital aspect of creating a more just and equitable society, where everyone, regardless of their background, has the opportunity to thrive.

Assignments

1. Discuss the significance of B.R. Ambedkar's perspective on social exclusion and how it shaped India's approach to social justice.
2. Explain the role of inclusive higher education policies in promoting social equality.
3. Analyse the impact of social exclusion on education and employment opportunities for marginalised communities.
4. Discuss the importance of the Indian Constitution in protecting the rights of marginalised groups and promoting inclusive policies.
5. Evaluate the effectiveness of reservations in public employment and education in reducing social exclusion.

Suggested Reading

1. Ambedkar, B.R, *Caste in India:Their Mechanism, Genesis and Development, in Babasaheb Ambedkar : Writings and Speeches*, Vol. I, Education Department, Government of Maharashtra, 1989.
2. Dube, Ishita Banerjee, *Caste in History*, OUP, 2008.
3. Kotani. H, *Caste System, Untouchability and the Depressed*, Manohar, 1997.
4. Sen, Amartya, *Social Exclusion : Concept, Application, Scrutiny, Critical Quest*, New Delhi, 2004.
5. Thorat, Sukhdev, *Blocked by Caste: Economic Discrimination in Modern India*, OUP, Delhi, 2012.

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1. Nayak, Pulin, *Economic Development and Social Exclusion in India*, Critical Quest, New Delhi, 2012.
2. Silver, Hilary, *The Process of Social Exclusion*, Critical Quest, New Delhi, 2011.
3. Thorat, Sukhdev and Narender Kumar, *B R Ambedkar and the Perspectives on Social Exclusion and Inclusive Policies*, OUP, Delhi, 2008.
4. - - - - - - - - - - - - - In Search of Inclusive Policy: Addressing Graded Inequality,
5. Rawat, New Delhi, 2008.

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.

QP CODE: ………   Reg. No   : ……….................
                         Name   : ………………...

THIRD SEMESTER M.A. HISTORY EXAMINATION
DISCIPLINE CORE - **M21HS04DE**
CASTE AND SOCIAL EXCLUSION IN INDIA
(CBCS - PG)
2023-24 - Admission Onwards
Model Question Paper (SET- A)

Time: 3 Hours   Max Marks: 70

SECTION A

*Answer any **ten** questions in a word or a sentence. Each question carries **one** mark.*

(10X1 = 10 Marks)

1. Name the book written by Louis Dumont on caste.
2. Which social reformer founded the Satyashodhak Samaj?
3. What is the 'Jajmani System'?
4. What was the central theme of Ambedkar's 'Annihilation of Caste'?
5. Identify one anti-caste movement in South India.
6. What is 'Vishti'?
7. Name any two Bhakti poets who challenged caste hierarchy.
8. What is meant by social stratification?
9. Mention the main idea of the Bhakti movement.
10. What is 'Kadamai'?
11. What is Agrestic Slavery?
12. What is the significance of the term 'Adi-Hindu'?
13. What role did the Zamindar play in the caste hierarchy?
14. Who led the Namasudra Movement in India?
15. Define 'Socio-spatial Exclusion'.

SECTION B

*Answer any **five** questions in two or three sentences. Each question carries **two** marks.*

(5X2 =10 Marks)

16. Explain the relationship between caste and occupation.
17. What is the significance of the Adi-Dravida movement?
18. What was D. D. Kosambi's interpretation of caste?
19. What was Gandhi's approach to the caste question?

20. Differentiate between 'Varna' and 'Jati'.
21. Discuss the role of women in caste-based social reform movements.
22. Describe the concept of inclusive education.
23. Discuss the role of land control in maintaining caste dominance.
24. How did the Bhakti movement challenge Brahmanical ideology?
25. Explain the concept of 'graded inequality' as discussed by B.R. Ambedkar.

SECTION C

*Answer any **five** questions in one paragraph. Each question carries **four** marks.*

(5X4 = 20 Marks)

26. Discuss the role of the *Balutedar* system in village community structures.
27. Explain how Periyar E.V.R. contributed to caste reform.
28. Explain the socio-economic impact of bonded labour in India.
29. Explain the concept of purity and pollution in the caste hierarchy.
30. Evaluate the contribution of Bhakti ideology to caste reform.
31. Discuss the influence of colonialism on caste stratification.
32. Examine the influence of the *Dharma Sastras* on the development of the caste system in India.
33. What is the relevance of constitutional principles in addressing social exclusion?

SECTION D

*Answer any **three** questions in two pages. Each question carries **ten** marks.*

(3X10 =30 Marks)

34. Analyse the European perception of caste and its implications.
35. Discuss the historical development of caste and social stratification in India.
36. Evaluate the contributions of Jyotiba Phule and Ayyankali in the struggle for equality and justice.
37. Critically discuss the arguments of G. Aloysius in *Nationalism Without a Nation in India*.
38. Describe Ambedkar's critique of Gandhi's position on caste.
39. Discuss how inclusive policies address social exclusion in contemporary India.

SREENARAYANAGURU OPEN UNIVERSITY

QP CODE: ………

Reg. No : ………................
Name : ………………...

THIRD SEMESTER M.A. HISTORY EXAMINATION
DISCIPLINE CORE - M21HS04DE
CASTE AND SOCIAL EXCLUSION IN INDIA
(CBCS - PG)
2023-24 - Admission Onwards
Model Question Paper (SET- B)

Time: 3 Hours   Max Marks: 70

SECTION A

*Answer any **ten** questions in a word or a sentence. Each question carries **one** mark.*

(10X1 = 10 Marks)

1. What is the origin of the term "caste"?
2. How many *Varnas* are mentioned in the Vedic texts?
3. Who is the author of *Homo Hierarchicus*?
4. Which theory links caste distinctions to racial types?
5. Name a Portuguese traveller who wrote about the caste system in the 16th century.
6. What does the term *jati* refer to?
7. Who were the *Raiyats* in the agrarian society?
8. Who coined the term "Brahmanical patriarchy"?
9. Who criticised caste as a system of graded inequality?
10. Who started the Adi-Dravida movement?
11. Who authored *Nationalism without a Nation in India*?
12. Name the key thinker who linked caste to economic exploitation through land ownership.
13. Name the leader associated with the slogan "Educate, Agitate, and Organise."
14. What was the primary occupation assigned to the Shudras in Vedic society?
15. Who are the dominant castes in rural India as defined by M.N. Srinivas?

SECTION B

*Answer any **five** questions in two or three sentences. Each question carries **two** marks.*

(5X2 =10 Marks)

16. Oriental Despotism
17. Asiatic Mode of Production
18. *Dharma Shastras*

19. Social Darwinism
20. Deshmukh
21. Brahmanical Patriarchy
22. Sanskritisation
23. Dalit
24. Uzhiyam
25. Jajmani system

SECTION C

*Answer any **five** questions in one paragraph. Each question carries **four** marks.*

(5X4 = 20 Marks)

26. Summarise B.R. Ambedkar's critique of caste in *Annihilation of Caste*.

27. How did the introduction of British land revenue systems affect caste hierarchies?

28. How did the *Bhakti* movement address caste issues in Indian society?

29. Briefly describe the contributions of Jyotiba Phule and Periyar to anti-caste movements.

30. How does D.D. Kosambi explain the formation of *Varna* and *Jati* in Ancient India?

31. Explain the concept of purity and pollution in the caste hierarchy.

32. Who were the *Deshmukh* and *Chaudhari,* and what was their role in local power structures?

33. What were *Vishti* and *Uzhiyam*, and how did they impact agrarian labour?

SECTION D

*Answer any **three** questions in two pages. Each question carries **ten** marks.*

(3X10 =30 Marks)

34. Discuss the European perceptions of caste, focusing on racial and occupational theories, and their impact on the understanding of Indian society.

35. Examine the power dynamics in agrarian society, highlighting the condition of labour, the practice of bonded labour, and the prevalence of agrestic slavery.

36. Assess the role of dissent culture, including saint poets, Sufis, and Bhakti ideology, in resisting caste-based and power hierarchies.

37. Examine the intersections of caste and gender, focusing on subordination, bondage, and marginalisation.

38. Critically analyse the contributions of the Adi-Hindu, Adi-Dravida, and Namasudra movements to the broader struggle for social justice and civil rights.

39. Assess the effectiveness of affirmative action and inclusive policies in addressing caste-based social exclusion in modern India.

സർവ്വകലാശാലാഗീതം

വിദ്യയാൽ സ്വതന്ത്രരാകണം
വിശ്വപൗരരായി മാറണം
ഗ്രഹപ്രസാദമായ് വിളങ്ങണം
ഗുരുപ്രകാശമേ നയിക്കണേ

കൂരിരുട്ടിൽ നിന്നു ഞങ്ങളെ
സൂര്യവീഥിയിൽ തെളിക്കണം
സ്നേഹദീപ്തിയായ് വിളങ്ങണം
നീതിവൈജയന്തി പാറണം

ശാസ്ത്രവ്യാപ്തിയെന്നുമേകണം
ജാതിഭേദമാകെ മാറണം
ബോധരശ്മിയിൽ തിളങ്ങുവാൻ
ജ്ഞാനകേന്ദ്രമേ ജ്വലിക്കണേ

കുരീപ്പുഴ ശ്രീകുമാർ

SREENARAYANAGURU OPEN UNIVERSITY

Regional Centres

Kozhikode
Govt. Arts and Science College
Meenchantha, Kozhikode,
Kerala, Pin: 673002
Ph: 04952920228
email: rckdirector@sgou.ac.in

Thalassery
Govt. Brennen College
Dharmadam, Thalassery,
Kannur, Pin: 670106
Ph: 04902990494
email: rctdirector@sgou.ac.in

Tripunithura
Govt. College
Tripunithura, Ernakulam,
Kerala, Pin: 682301
Ph: 04842927436
email: rcedirector@sgou.ac.in

Pattambi
Sree Neelakanta Govt. Sanskrit College
Pattambi, Palakkad,
Kerala, Pin: 679303
Ph: 04662912009
email: rcpdirector@sgou.ac.in

Caste and Social Exclusion in India

COURSE CODE: M21HS04DE