



## Development Review

## Caste and development: Contemporary perspectives on a structure of discrimination and advantage



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## ABSTRACT

Inherited caste identity is an important determinant of life opportunity for a fifth of the world's population, but is not given the same significance in global development policy debates as gender, race, age, religion or other identity characteristics. This review asks why addressing caste-based inequality and discrimination does not feature in intergovernmental commitments such as the Sustainable Development Goals, and whether it should. Taking India as its focus, it finds that caste has been treated as an archaic system and source of historical disadvantage due compensation through affirmative action in ways that overlook its continuing importance as a structure of advantage and of discrimination in the modern economy, especially post-liberalization from the 1990s. A body of recent literature from anthropology, economics, history and political science is used to explore the modern life of caste in society, economy and development. Questions are asked about caste as social hierarchy, the role of caste in post-liberalization rural inequality, in urban labor markets and in the business economy, and the effect of policies of affirmative action in public-sector education and employment. Caste is found to be a complex institution, simultaneously weakened and revived by current economic and political forces; it is a contributor to persisting national socioeconomic and human capital disparities, and has major impacts on subjective wellbeing. Caste effects are not locational; they travel from the village to the city and into virtually all markets. Caste persists in the age of the market because of its advantages – its discriminations allow opportunity hoarding for others; and the threat of the advancement of subordinated groups provokes humiliating violence against them. The evidence points to the need for policy innovation to address market and non-market discrimination and to remove barriers, especially in the informal and private sector; and to ensure caste has its proper place in the global development policy debate.

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## 1. Introduction

The Sustainable Development Goals (SDGs) emphasize equality of opportunity and reducing inequality of outcomes, the elimination of discrimination in law, policy and social practice, and socio-economic inclusion of *all* under the banner goal 'to leave nobody behind'. "All" here means, "irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status" (SDG 10.2). There is no specific mention of caste.

Several international human rights organizations insist that worldwide over 260 million people suffer from discrimination based on caste (or 'work and descent', the UN terminology for such systems of inherited status), that caste is "a fundamental determinant [of] social exclusion and development"<sup>1</sup>, and affects some 20–25 percent of the world's population – including (but not restricted to) the peoples of South Asian nations and their diasporas. They have lobbied for caste to be recognized in progress indicators and data disaggregation, and have published shadow reports on caste disparities hidden in national reporting on SDGs (ADRF, 2017).

While prohibited by international human rights law, caste/ "work and descent"-based discrimination is excluded from the agenda of intergovernmental negotiations such as on the SDGs. Should the global policy agenda pay attention to identities and relations of caste as drivers of poverty and inequality? What is the evidence that caste still matters as a determinant of opportunity today, and what might its mechanisms be? Why is caste so often off the agenda, and treated differently from age, ethnicity, or religion? The topic is dauntingly large, and the present review is limited to caste in India's economic processes and policy approaches.

The intersecting nature of identities (caste, class, gender, religion) that give poverty in India its distinctive social face means that ultimately caste cannot be independently examined (Shah et al., 2018). Nonetheless, this review covers work that empirically and analytically attempts to identify the "grammar" of caste (Deshpande, 2017) at work behind persisting socioeconomic and human capital disparities in India (and by extension elsewhere). Today, absolutely and proportionately, the country's capital wealth (land, buildings, finance etc.) is largely in the hands of the "upper" castes, and the "lowest" castes participate in the economy primarily as wage laborers.<sup>2</sup> Per-capita income or access to high-status occupations decrease as we pass down the hierarchy, as does the *return* on factors such as better education or capital assets, while the proportion of people in poverty increases, indicating what the Dalit political leader B.R. Ambedkar referred to as a system of "graded inequality" (see Thorat [2017] for analysis of data to 2014). Aggregating disparities in occupation, education and assets into a Caste Development Index, Deshpande (2017, 93) shows that the degree of caste inequality is unimproved (and sometimes worsened) by the greater wealth or faster growth of different Indian states. Statistically, in India the caste into which a person is born remains among the most important determinants of life opportunity.

Caste is a source of embarrassment and controversy in middle-class India. Is it relevant to talk about caste in modern times? Isn't

caste an "internal" matter of heritage and culture beyond the remit of global agendas? Certainly, we do not find caste treated alongside gender, race or age in the international analysis of poverty and inequality. I will start this review (Section 2) by asking how caste is conceived such that it evades global policy attention. This will involve looking at the history of caste in India's social policy. Section 3 turns to anthropological debates on caste hierarchy and change. Section 4 considers caste and rural economic change. Turning to the wider economy, Section 5 looks at caste and labor markets, and Section 6 at caste in the business economy. I will take stock (in Section 7) of evidence on caste as a modern structure of opportunity and of discrimination (Harriss-White, 2014), before turning to India's affirmative action policy (Section 8). The final section of the article considers what idea of caste might be helpful to grasp its role in contemporary economic life.

## 2. Caste in Indian social policy

### 2.1. (a) Caste as a residual issue of religion and culture

The claim that caste is marginal to development policy debate requires some justification since caste appears central in Indian policy and the politics of affirmative action. My point is that the manner in which caste has entered social policy largely overlooks caste as a continuing structural cause of inequality and poverty in present-day market-led development, and instead treats it as an archaic Indian cultural and ritual phenomenon erased by such development, or as a social disability subject to (in principle, temporary) "special measures" (see Waughray, 2010, 336–37).

The government of independent India was reluctant to use caste as an explainer of poverty and inequality, and there was no place for social classifications used in the colonial administration; hence the abandonment of caste categories in the post-Independence national censuses (Dirks, 2001; Jaffrelot, 2006).<sup>3</sup> Both Gandhian utopianism and socialist universalism expected archaic caste to disappear with modernization. Nonetheless, the Indian Constitution, which enshrined a commitment to equality in its directive principles, also recognized historical disadvantage, giving – by a presidential order (in 1950) – special protection and benefits to a list (or schedule) of castes (first drawn up by the British in 1936) whose "extreme backwardness" arose "out of the traditional practice of untouchability," without there being a definition or test of such untouchability (Dirks, 2001; Galanter, 1984).<sup>4</sup> Since now-outlawed untouchability was taken to be a Hindu practice, the category of Scheduled Castes (SCs, which censuses record as about 17 percent of the population) excludes Muslim and Christian converts who, evidence shows, experience equivalent untouchability (Ministry of Minority Affairs, 2009; Mosse, 2012).

<sup>3</sup> Debate around caste enumeration was revived by the 2011 Socioeconomic and Caste Census (<http://www.secc.gov.in>) which was based on voluntary disclosure but left caste-demographic data unpublished (Deshpande & John, 2010).

<sup>4</sup> On official criteria applied to Scheduled Castes, see <http://socialjustice.nic.in/UserView/index?mid=28545#sc1> (accessed 11 April 2017). In parallel, provisions were made for a list of Scheduled Tribes (STs), the Adivasi or "aboriginal" groups not discussed here. At one level, the SC/ST distinction could be regarded as arbitrary, given the sociological continuum between "caste" and "tribe" (Bailey, 1961; Shah et al., 2018), but at another it points to two distinct forms of identity and discrimination: one rooted in ranked relationships of servitude; the other, rooted in geographical separation and dispossession, especially in relation to forest-based livelihoods (see, e.g., Sundar & Madan, 2016).

<sup>1</sup> <http://asiadalitrightsforum.org/images/imageevent/1736746861NCDHR%20-%20SDG%20-%20Nov%202015.pdf> accessed 21 January 2018.

<sup>2</sup> There are no easy alternatives to the contentious and simplifying terms "upper" and "lower" caste used in cited articles, but it should be clear they refer not to an accepted rank, but a history of power, domination and unequal social recognition, encoded in vernacular as well as sociological languages.

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