

# Research Methodology



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# Outline

- Research Methodology
- Field work & Data Collection
- Data editing, analysis & interpretation
- Report Writing
- Dissemination of Research Findings

## IV. Research Methodology

- Research methods affect the quality of the data obtained.
- It defines **populations** to be studied in terms of:
  - Political,
  - Geographic,
  - Socio- economic, and
  - Demographic
- It describes **sample** selection process (if applicable)
  - Identify the type of sample
  - Specify the sample size calculations

## Cont.....

- It defines the **data** to be collected:
- It defines comparison groups
- List all variables and include conceptual and operational definitions.
- Describe **data collection procedures**.
  - Indicate data collection methods
  - Describe data collection instrument/ study tools
  - Discuss consent procedures
  - Discuss confidentiality

## Cont.....

- It describes **quality control procedures**:
  - Pre-test data collection instrument
  - Re-interview subgroups of respondents
  - Describe plans for data control
  - Indicate multiple sources of information
- RM Will vary according to the purpose of the research and study design.
- Two types of Research Methods:
  - Quantitative and
  - Qualitative methods.

# Quantitative Research Method

- Quantitative research method uses numerical analysis.
- This approach reduces the data into numbers.
- The researcher knows in advance what s/he is looking for and all aspects of the study are carefully designed before the data is collected.
- The objective of quantitative research is to develop and employ mathematical models, theories and/or hypotheses pertaining to phenomena.

# Research Design

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# Outline

- Research
- Research Design
- Research Problem/ Topic
- Literature Review
- Research Objectives
- Research Methodology
- Field work & Data Collection
- Data editing, analysis & interpretation
- Report Writing
- Dissemination of Research Findings



# Research?

- **Research** is the systematic collection, analysis, and interpretation of data to answer a certain question or solve a problem.
  - **Basic research** is necessary to generate new knowledge and theories to deal with major unresolved problems.
  - **Applied research** is necessary to identify priority problems and to design and evaluate policies and programs that will deliver the greatest benefit, making optimal use of available resources.

## Why Research?

- Research serves many purposes; three of the most common and useful purposes are: description, exploration, and explanation. Many studies can and often do have more than one of these purposes.
- Research helps in theory building and theory testing.
- Research generates all important evidence for decision making.
- Research is also a management tool and management is all about anticipating problems, making decisions.

## Research Design

- Also known as study or project design.
- It is the basic plan that guides researcher in the execution of the research project undertaken.
- It means preparing a detailed plan and procedures for conducting the research. It is like preparing a master plan or blue print.
- Determined in part by the primary purpose of the research.
- It refers to the structure of an enquiry: it is a matter of logical rather than logistical one.

# Research Design

- It is a logical task undertaken to ensure that the evidence collected enables us to answer questions or test theories as unambiguously as possible.
- In short, research design is a systematic planning, organizing and executing a research project within specified time limit and resource allocation. Research design tells the type of data to be collected, the sources of data and the procedures to be followed in data collection. Research design provides suitable framework that guides the collection and analysis of data.

## Health and Society

Rajeev Kamal Kumar (Draft -19.6.20)

### Contents

1. Health: Meaning and Concept
2. Determinants of Health
3. Dimensions of Health
4. Health and Development
5. Health and Society

### Health: Meaning and Concept:

Human health is a complex, influenced not only by the biology and chemistry of the body but also by social structures, culture, and politics and economy.

Holistic view of health suggests considering physical, social, mental and spiritual well-being. Health is created in everyday life and arises from the interaction between individual life cycle and social and physical environment.

The social environment consisted of social relations- including household, family, relatives and friends; social surroundings including- neighbour, school, workplace; and social institutions including cultural and religious institutions, economic and political institutions.

### Definitions:

Health is the level of functional or metabolic efficiency of living organism i.e. free from illness, injury, or pain.

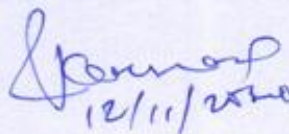
According to WHO (1946): "Health is a state of complete physical, mental and social well-being and not merely the absence of disease and infirmity".

Criticism of the WHO's definition of health as nobody is completely free from the above and healthy at a particular time. This definition is not being considered as operational definition.

The ability to adapt and to self-manage have been suggested as core components of human health.

### Determinants of Health:

1. **Health Care interventions:** It includes both Preventive and Curative interventions.
  - a. **Preventive interventions:** It includes all the preventive aspects on the part of the state/Govt. or at family and community levels such as- immunization for the children and pregnant women, supplementary nutrition provided to the pregnant women, lactating women and children
  - b. **Curative interventions:**

  
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2. **Surroundings:** It includes both physical and social surroundings. It denotes to the environment which may further categorized into natural environment and social environment.
  - a. **Physical environment**
  - b. **Social environment**
3. **Background:** Socio-economic background
4. **Lifestyle**
5. **Economic and Social Conditions**
6. **Person's individual characteristics and behaviours-** attitude, psychology, genetic inheritance

**Key Factors that influence health:**

1. **Income and Social Status**
2. **Social Support network**
3. **Education and literacy**
4. **Employment/working condition**
5. **Social environment**
6. **Physical environment**
7. **Personal health practices and coping skills**
8. **Healthy child development**
9. **Biology and genetics:** what kind of genes inherited by the children
10. **Health care services**
11. **Gender-** includes the issue of provision of nutrition intake by the males and females in the family, health care decision making and other decision making in the family, gender budgeting. Types of diseases among males and females- females and prone to some diseases more due to the biological factors. In addition, the women suffer heavily in the process of child delivery and rearing practices. Some women develop some kind of disability for life.
12. **Culture**

**There are three inter-dependent health fields:**

- 1) **Lifestyle**
- 2) **Environmental**
- 3) **Bio-medical:** medical factor and genetic factor (genetics – inherited traits from parents)

**Dimensions of Health**

- Health in community perspective
- Health as human right
- HIV/AIDS
- Social disparities in health or universal health insurance
- Food Security
- Prevention of Diseases and immunizations

The study area of health may be categorised broadly into- Clinical Health and Public health. Clinical practitioners (medical doctors) focus mainly on the health of individuals; while the Public Health considers the overall health of communities and population.

- **Clinical Health:**

- **Public Health:** the science and art of preventing disease, prolonging life and promoting health through the organized efforts and informed choices of society, organizations (public and private), communities and individuals. Under this, health threats of population based on the analysis of population is sought.

**Sub-fields of Public Health:**

- 1) **Epidemiology:** Study of the patterns, causes, and effects of health and diseases in different population.
- 2) **Bio Statistics**
- 3) **Health Services**
- 4) **Environmental Health**
- 5) **Community Health**
- 6) **Behavioural Health**
- 7) **Occupational Health**

Therefore, public health focuses on prevention and management of diseases/injuries and other health conditions through surveillance of cases and promotion of health behaviour in communities and by managing the environment.

Alma Ata Declaration of 1978 declaring "Health for All" by 2000 AD. India was also a signatory to this declaration. The main emphasis of this was to decrease mortality and increase life expectancy.

## **I. Health and Development**

*(Ref: Health and Development: Inter-sectoral linkages by K.V. Narayana, Rawat Publications, 1997)*

It was assumed that the "Health for All" may be achieved, independent of overall socio-economic development of people, through direct state interventions in the form of universal Primary Health Care. Other socio-economic factors such as nutrition, environment sanitation, literacy etc. play a greater role than narrowly defined health care services in determining the physical, mental and social well-being of people, especially in early stages of development.

Govt. expenditure on health in different Financial Years remaining very low.

Kerala is doing very good on all health indicators despite a poor state and low expenditure on health care services. It means the economic status and expenditure on health services is not mandatory criteria for good health status. Kerala has achieved this status through preventive and promotive health care services and also due to the social development and not due to the economic development. This is why it is called as "Kerala Paradox".

The role of public policy in improving the quality of life depends upon its impact on the very nature of the development process rather than on the provisions of a few public services.

It is sometimes argued that for a given level of development the health status can be maximized through deliberate interventions in the form of better health care services. Here it may be contended that the development of health care system is itself an integral component of overall socio-economic development. There cannot be a well-developed health care system in a backward region. Development is a cumulative process wherein the development in one sector stimulates and facilitates the development in others. Different studies have proved that the access to medical care was positively related with the level of socio-economic development (Basu, 1987; Narayan, 1997).

With the changing concept of development, health status of people has assumed a significant place in the development strategy as it is seen in terms of improvement in quality of life which is directly linked with better health status of people. The impact of development process on income distribution, poverty, rural-urban disparities, social inequalities, etc., is increasingly seen in terms of consequences to the health status of people.

Inter-state variations in the health status in India are only manifestations of disparities in overall socio-economic development. Improving health status of population requires better nutrition and environmental conditions, and not merely medical care.

## **II. Health, Health Care and Development**

Debate over the relative importance of various factors associated with improvement in the health status of population. Two approaches: – Social Policy – Technological Change approach in which rise in health status is attributed primarily to the health care programmes. Secondly, the Development approaches where the improvement in health status is treated as an integral aspect of overall socio-economic development.

Developed countries having more degenerative diseases such as – cancer, heart problems, diabetes, arthritis, etc., these are also known as lifestyle diseases.

The main focus of development versus public health debate is centered around the so called paradox of high status of health of a relatively low level of development in Sri Lanka and Kerala because of higher rate of utilization and brought curative medicine within the reach of the majority due to high priority given to preventive and promotive measure in health care. Land reforms, Public Distribution System (PDS), literacy and housing etc. played a very important role in reduction of socio-economic inequalities and lead to better utilization of health services.

In the case of Kerala, we found low mortality and better health indicators due to wider distribution of health care services in the state, and its better utilization, high literacy rate of the population, better coverage and transportation facilities, and political awareness etc. (Nag, 1984)

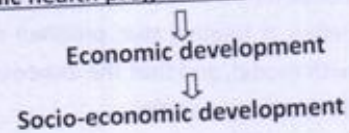
Most of the diseases in developing countries are rooted in under nutrition and unhygienic living and working conditions associated with poverty.



**1. Social policy-technical change approach-** It focuses on widened scope of public health programs in developing the health status of the population. The determinants of ill health are assumed to be purely biological and the patterns of morbidity and mortality are considered in isolation from social and economic context in which they occur.

**2. Development approach-** in this approach, improvement in health status is viewed primarily as a product of socio-economic development or as an integrated component of development process. If there is better development of the society then it automatically affects the health status of the population.

- ❖ In the beginning, mortality decline was attributed to increase in food production and supply. Later sanitary reform movement in 19<sup>th</sup> century as important factor of mortality decline and later in progress in medical and scientific advancement in 20<sup>th</sup> century were attributed for improvement of health status. Later emphasis was laid on public health programmes.



(Ref: Nag, Mani (1983) 'impact of social and Economic Development in mortality: comparative study of India and west Bengal, EPW, No. 19.10 & 21.)

### III. Evolution of Integrated concept of Socio-economic Development

#### Origin of Development Economics

- Analysis of long term growth and development - **Classical Economists**
- **Marginalist School-** late 19<sup>th</sup> century- reduced the economic analysis to a static framework which was preoccupied with the problem of resource allocation and the theory of exchange.
- **Post. War-** economic theory to deal with the problems of poverty and development.
- **End of colonial rule** – elimination of poverty and improvement in quality of life.
- During 1950s the Development Economics began growing out of colonial economics.
- **Keynesian Economics** was mainly concerned with the problems in advanced capitalist economy. It had a strong influence on the development economics in which industrialization, capital formation and planning became the central themes.
- ❖ **Identification of Development with economic growth:** Initially development is seen only as economic development.
- ❖ **Post-war strategy of Development:** Development economics trapped initially in – 'vicious circle of poverty', 'low level equilibrium trap'- Low supply and demand. Development Economists proposed capital formation as the key to break the vicious circle of poverty.
- ❖ **Harrod –Domar Model- Capital formation and economic Growth** – growth in national income is a joint function of national savings ratio and capital output ratio. Income growth is directly proportional to the savings ratio and inversely related to the capital output ratio.

-Developing countries- lack of domestic savings leading to low level of capital formation.

- ❖ **Growth VS Distribution:** Since the main object of development was growth, consideration for distributive justice was brushed aside under the assumption of 'trickle-down theory' – i.e. once the per capita income is achieved, the benefits of development would automatically percolate down to the masses and eliminate the social problems of unemployment, inequality and poverty. Considerations of distributive justice at the earlier stages of development were assumed to be self-defeating as a source of savings and incentives for the entrepreneurs, a certain degree of inequality was considered essential for rapid economic growth.

In 1960s and early 1970s, it was believed that a higher level of personal and corporate income was essential for the higher rate of savings which is the crucial factor in the 'Harrod-Domar Growth model'. Since the growth in national income is assumed proportional to the rate of savings in the economy, an economy with wider inequalities would serve more and grow faster.

Development was also seen as a universal and linear process which had to be passed through by all societies. It implied that problem of developing counter could be solved within the framework of growth model, and that the experience of developed countries was directly relevant to the problems of developing countries.

#### **Dissent in Development Strategy**

In late 1970s, western developed countries realized the exhaustion of non-renewable sources of energy and ecological degradation. 'Neo-Marxian theories of development' – restructuring of economic institutions was realized – concept of development widened to give explicit considerations to the social objectives of eradicating poverty, unemployment and inequalities.

#### **Integrated view of Socio-economic Development**

By mid 1970s, it was realized that choice is not between growth and equity but the type of economic growth and integrated development.

**Development-** growth plus change and change in turn, social, cultural of well as economic, and qualitative and quantitative.

**Redistribution with growth** – poor should be made the major beneficiaries of growth.

**Basic needs approach** – The content of growth is emphasized rather than the rate of growth of income-satisfying primary needs of human beings even at relatively low per capita income.

**Growth approach** – economic growth is achieved through the development of selected industries catering to the needs of the rich.

**Integrated development Approach-** improvement in the quality people's life and means to achieve it is consumption and investment at the same time, and also the source of demand and supply of resources.

#### **Summary: Status of Development**

- **Capital formation** – Harrod – Domar Model – inequality among people- benefit to the rich – Trickle down – economic growth.

- Income distribution and equity – became additional objectives of development Policy.
- Integrated Development – quality of life- improvement in education, health, standard of living etc.

#### IV. Approaches to the management of Development

##### **National Income and measurement of Development**

- GNP- Single best indicator of the material well- being of people in the post war decades.
- Poor nations having low quality of life- development is measured in terms of literacy, mortality etc. GNP- Does not measure social welfare and it does not reflect the structural and distribution aspects of development process. GNP has lost its credibility by the end of 1960s.

Development is not an empirical but a normative concept involving definite values, goals, and standards which provides basis to evaluate and compare the present state against a desired state, or compare two different states of development across space (Baster, 1972)

- **The economic welfare approach:** Income is not a reliable indication of the individual's command over resources because of also depends upon the access to various goods and services.
- **The Social Indicator Movement:** 1970s- from exclusive concern for growth in national income to overall improvement in the quality of life.

##### **3 stages of transforming concepts into empirical indices**

1. Initial articulation of a concept
2. Specification of components or dimensions of concepts, and
3. Selection of indicators representing these dimensions

**Composite Index of development:** Includes different indicators and convert into scale

#### **VII. Conclusion**

There are two divergent approaches to the analysis of historical trends in the sources of health improvement- 1) In the social policy technical change approach, emphasis is on the technological progress in medicine and public health, and 2) In contrast, the development approach attributes improvement in health status to overall progress in the society.

The reappraisal of development concepts and indicators, increasingly in terms of quality of life, has made the health status of people a major objective of the development process.

It was found that health status of people was highly correlated with different components of socio-economic development. The premises are health of people is more dependent upon the overall socio- economic development than the public health care system only. In addition, the provisions of health care itself were an integral aspect of socio- economic development.

Most of the health problems in India and other developing countries have their genesis in poverty. Under nutrition and unhygienic living and working conditioning account for most of the morbidity and mortality in the country. The eradication of ill -health is, therefore, a socio- economic problem.

The decrease in mortality rates and increase in life expectancy imply wider percolation of benefits from the development process. The increase in woman's status also indicates the wider distribution of gains from the development process.

**Health for All: An Alternative Strategy; 1981, ICSSR & ICMR, IIE, Pune; JK Offset Printers, Delhi.**

#### **Health Services for Women and Children**

Low sex ratio, mortality among women below the age of 50 years is greater than males and especially in reproductive age women (15-45 years). There may be many reasons for high mortality of women such as low nutrition status, poor health services for females as compared to males; while women need more health care. The provisions of facilities for women in public health system (as measured by women doctors, beds reserved for women etc.) are also significantly less than that for men. This is also supported, at any given time more women than men are ailing, but their illness tends to be neglected. They generally receive free traditional treatment of doubtful efficacy or none at all.

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**Ghosh, Soumitra: Trends and differentials in health care utilization pattern in India, JHM, 16 (3) 337-363 Sage, sep. 2014.**

Most respondents preferred private source of care because of their dissatisfaction with the services of the Government doctor or public facilities, problems of access in the public sector, long waiting and other reasons. Moreover, the proportions of people who did not utilize the services from the public facilities because of perceived low quality of public health care and long waiting has considerably increased during the period 1995-96 to 2004.

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# Health and Society

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## Health: Meaning and Concept

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**Curative interventions:** Concerns with diagnosis and treatment- clinical interventions

- **Surroundings:** It denotes to the environment which may further categorized into natural environment and social environment.

Physical environment

Social environment

- **Background:** Socio-economic background
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- **Person's individual characteristics and behaviours-** attitude, psychology, genetic inheritance

## Key Factors that influence health

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12. **Culture**

## Sociology of health and illness

- The **sociology of health and illness**, alternatively the **sociology of health and wellness** (or simply **health sociology**), examines the interaction between society and health.
- It studies how social life affects morbidity and mortality rate, and vice versa. This aspect of sociology differs from medical sociology in that this branch of sociology discusses health and illness in relation to social institutions such as family, employment, and school.
- The sociology of medicine limits its concern to the patient-practitioner relationship and the role of health professionals in society. The sociology of health and illness covers sociological pathology (causes of disease and illness), reasons for seeking particular types of medical aid, and patient compliance or noncompliance with medical regimes.

Cont.,

- Health, or lack of health, was once merely attributed to biological or natural conditions.
- Sociologists have demonstrated that the spread of diseases is heavily influenced by the socioeconomic status of individuals, ethnic traditions or beliefs, and other cultural factors. Where medical research might gather statistics on a disease, a sociological perspective on an illness would provide insight on what external factors caused the demographics who contracted the disease to become ill.
- There are obvious differences in patterns of health and illness across societies, over time, and within particular society types. There has historically been a long-term decline in mortality within industrialized societies, and on average, life-expectancies are considerably higher in developed, rather than developing or undeveloped, societies.

Cont..

- Patterns of global change in health care systems make it more imperative than ever to research and comprehend the sociology of health and illness.
- Continuous changes in economy, therapy, technology and insurance can affect the way individual communities view and respond to the medical care available.

## Conducting Ethnographic Study among Indigenous Communities

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### Introduction:

The term "Ethnography" has been derived from the Greek words - *ethnos* meaning "folk, people, nation" and *grapho* meaning "I write". It is a research designed to explore cultural phenomena of any specific community. It is also a means to represent graphically and in writing, the culture of a group. The word can thus be said to have a "double meaning," which partly depends on whether it is used as a count noun or uncountably. It is a kind of social research and the product of this kind of research. An older term with partially overlapping meaning is ethnology, but this is now rarely used. Ethnography is a form of inquiry that usually relies heavily on participant observation—on the researcher participating in the setting or with the people being studied, at least in some marginal role, and seeking to document, in detail, patterns of social interaction and the perspectives of participants, and to understand these in their local contexts.

The origin of ethnography may be traced back to 18th century when Gerhard Friedrich Müller developed the concept of ethnography as a separate discipline whilst participating in the Second Kamchatka Expedition (1733–43) as a professor of history and geography. However it was August Ludwig von Schlözer and Christoph Wilhelm Jacob Gatterer of the University of Göttingen who introduced the term into academic discourse in an attempt to reform the contemporary understanding of world history. In Anthropology, the method was employed extensively by a few earlier anthropologists such as Malinowski, Mead, and others.

Traditionally, the ethnographer focuses attention on a community, selecting knowledgeable informants who know the activities of the community well. These informants are typically asked to identify other informants who represent the community, often using chain sampling. This process is often effective in revealing common cultural denominators connected to the topic being studied. Ethnography relies greatly on up-close, personal experience. Participation, rather

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than just observation, is one of the keys to this process. Ethnography is very useful in social research.

Ethnography had its origin in social and cultural anthropology in the early twentieth century, but spread to other social science disciplines, notably sociology, during the course of that century. Most of the canonical texts of the Anthropology are also ethnographic in nature. The resulting field study or a case report reflects the knowledge and the system of meanings in the lives of a cultural group.

The main purpose of this document is to provide the basic understanding on the concept of ethnography to the doctoral fellows. This paper tries to outline the importance of ethnographic method as one of the most important methods in understanding the society, culture and human behaviour. The ethnographic method has been useful in conducting in-depth studies among the indigenous communities in different cultural settings. It is mainly concerned with the approaches to the field and interaction processes that took place between researcher and studied community members to understand their society and culture. It also tries to highlight the issues and challenges faced by the researcher in conducting these studies.

#### **Ethnography and Anthropology:**

Ethnography and Anthropology are closely interlinked as the approaches and methods implied are similar, especially in social and cultural anthropology. Ethnography, as the empirical data on human societies and cultures, was pioneered in the biological, social, and cultural branches of anthropology but has also become popular in the social sciences in general—sociology, communication studies, history—wherever people study ethnic groups, formations, compositions, resettlements, social welfare characteristics, materiality, spirituality, etc.

Social research is a systematic method of exploring, analyzing and conceptualizing social life in order to extend, correct or verify knowledge, whether that knowledge aid in the construction of a theory or in the practice of an art (Young, 1988)." This social research seeks to find explanations to unexplained social phenomena, to clarify the doubts, and correct the misconceived facts of social life. There are mainly two methods of study in social science- quantitative and qualitative. The quantitative method deals with the analysis and interpretations of numbers whereas qualitative method is concerned with text and context. Quantitative analysis also allows

researchers to test specific hypotheses, in contrast to qualitative research, which is more of exploratory in nature. Qualitative method is grounded in a philosophical position, which is broadly “interpretive” that is concerned about how the social world is interpreted, understood, and experienced or produced.

The discipline of Anthropology, especially social/cultural Anthropology, is mainly based on the second type of research method. In the anthropological research method, the researcher gets a chance to trace historical events, their causes, long term consequences, and derive insightful explanations for all these events. It is all about understanding the context in which different events take place in the lives of a particular community under the study. The use of qualitative research methods in the discipline of Anthropology may be traced back to middle of 19<sup>th</sup> century when Franz Boas (1858-1942) used the field survey for his research work. He was a strong critique of Arm-Chaired Anthropologists and advocated for the need of field work to study the human beings and their society and culture.

Later on A.L. Kroeber, Bronislaw Malinowski, AR Radcliffe Brown, Margaret Mead, Ruth Benedict, etc., have taken this tradition of field work and qualitative study in Anthropology forward. It was Malinowski who has used the ‘Participant Observation’ technique for the first time while he was studying among Trobriand Islanders. Most of these Anthropologists largely dependent upon ethnographic method in conducting studies among tribal communities. Anthropology is a field based observational science, which studies the social life of the people from insider perspective or ‘from within.’ It is guided by its own distinct methodological orientation, which is an integral part of anthropological research. Anthropological approach is holistic which stipulates for the integrative, people-centred paradigm in which data and information are directly obtained through the method of fieldwork. Thus, fieldwork is central to anthropology or rather fieldwork sustains anthropology (Goode and Hatt 1981, Radcliffe-Brown 1983, Young 1988, Fetterman 1989, Doshi and Jain 2002).

#### **Ethnography as a Method:**

The literal meaning of ethnography is to write about the people. It is the study of individual cultures and it is primarily descriptive and non-interpretive (Tylor 1991). It refers to the genre of writing that presents qualitative description of human social phenomena, based mainly on fieldwork and observation. Ethnographic approaches to data collection produce voluminous



unstructured data from a range of sources, for example fieldwork note, diary entries, memos and where appropriate interview transcripts. Unlike popular belief, qualitative method can also produce a vast amount of data. In this, the researcher gets a chance to trace the historical events, their causes and long term consequences and derive insightful explanations for all these events. Qualitative research is often referred as anthropological research simply because the kind of approach central to it is developed within anthropology, or it is also referred as field research or intensive field research or sometime as ethnographic research (Kumar, 2014).

Ethnography is not only a method but also a process and comprised of a set of methods using different tools and techniques at the same time for conducting the ethnographic study. These are observation, case study, in-depth interview, focused group discussion, field diary, etc. These tools and techniques are used separately or together at the same time to conduct ethnographic study. The researcher is involved in participating in certain activities among the studied population, also taking interviews or conducting FGD and making notes together at one point of time. Cultural anthropology and social anthropology were developed around ethnographic research and their canonical texts are mostly ethnographies e.g. 'Argonauts of the Western Pacific' (1922) by Bronislaw Malinowski; 'Coming of Age in Samoa' (1928) by Margaret Mead; 'The Nuer' (1940) by E. E. Evans-Pritchard; etc. Ethnographers are mainly participant observers.

The typical ethnography is a holistic study and so includes a brief history, and an analysis of the terrain, the climate, and the habitat. In all cases it should be reflexive, make a substantial contribution toward the understanding of the social life of humans, have an aesthetic impact on the reader, and express a credible reality. It observes the world (the study) from the point of view of the subject (not the participant ethnographer) and records all observed behavior and describes all symbol-meaning relations using concepts that avoid casual explanations.

According to Bronislaw Malinowski, a typical ethnography attempts to be holistic and typically follows an outline to include a brief history of the culture in question, an analysis of the physical geography or terrain inhabited by the people under study, including climate, and often including what biological anthropologists call habitat. Material culture, technology, and means of subsistence are usually treated next. Kinship and social structure (including age grading, peer groups, gender, voluntary associations, clans, moieties, and so forth, if they exist) are typically

included. Languages spoken, dialects, and the history of language change are another group of standard topics. Practices of childrearing, acculturation, and emic views on personality and values usually follow after sections on social structure. Rites, rituals, and other evidence of religion have long been an interest and are sometimes central to ethnographies, especially when conducted in public where visiting anthropologists can see them.

### **Stages of Ethnographic Study**

Before starting any ethnographic study, meticulous planning is required, which includes developing a detailed research design, developing and finalizing the study tools, piloting the area and pre-testing the study tools, entry into the field and establishing rapport with the community, conducting in-depth interviews, formal and informal discussions, casual observations, etc. At each stage of the ethnographic study, the researcher may face several challenges and has to show extreme caution and patience in eliciting the information from the indigenous population.

### **Research Design**

While developing the research design a few important factors, such as feasibility, organization of fieldwork, tools and techniques to be employed, time and its cost and finally its significance, need to be considered. "A study design includes at least the following component parts which are interdependent and not mutually exclusive: sources of information to be tapped, nature of study, objectives of study, socio-cultural context of study, geographical areas to be covered, periods of time to be encompassed, dimensions of the study, the basis for selecting the data techniques to be used in gathering data" (Young, 1988).

### **Pilot Survey**

The main aim of pilot survey is to finalize the study area (universe), pre-testing of the study tools and familiarity with the population to be studied and feasibility of the study. This is also essential for the acquaintance with area and people and establishing a good rapport with them, so that in subsequent visits, data could be collected easily without losing much time. Another aim of the pilot survey is to be gathering the required details about the area and the people from the local offices, such as block and district government offices, the offices of any NGO working in the area, etc. While choosing the area a few important factors need to be kept in mind including

considerable tribal population, accessibility in terms of reach to the area and community, etc. Before moving to the field for final data collection, the study tools should be firmed up on the basis of the experience and information collected during the pilot survey.

### *Entry into the Community*

Before making entry to the communities, all necessary preparations should be made as gaining access to the community is most difficult part of any ethnographic research. It not only allows the ethnographer to gather information but ideally it also provides acceptance as a member of the studied community for the time being. Initially there may be some hesitation on the part of both-respondents and researcher in discussing and eliciting information especially the information related to the family and personal domain. But as time passes the community accepts the presence of researcher and started coming forward to provide information and discussion. The informal and casual discussions with the community members may also prove very helpful as these provided more insights into the studied communities' lives. The researcher gains intimate knowledge and deep understanding of the context of social action and relations of the studied communities gradually as an insider.

One of the challenges in the field is to make the arrangements for the stay and food. These may also take considerable amount of time of the researcher. While making the stay arrangement at the field camp, certain factors need to be considered, such as, proximity and accessibility to the community, safety and security of base camp, etc. The stay in the field may be very challenging and difficult for the researcher due to the local climatic conditions such as harsh winter and scorching summer and erratic electric supply. Sometimes the ethnographic field also provides opportunities to interact with complete strangers, who may not belong to the studied communities, but they have important information of the area and the communities. Spending time with them and casual discussion provide much in-depth knowledge on the subject.

### *Data Collection*

The data collection in ethnographic study consumes a lot of time and requires huge patience of the ethnographer, as it is a gradual process, largely depending on the in-depth discussions with the respondents and community men and also participation in their day-to-day lives and casual observation. The researcher has to decide the approach – participant or non-participant

observation of the study as per the prevailing situation. The researcher may start with the non-participant observation, which help in gaining information on settlements pattern, house type, dress pattern, food habits, etc. As the time progresses and the rapport establish, the researcher I moved to participant observation that helps in gaining information related to social behaviour, social relations and customs, practices, etc., of the people.

The prescribed methods for conducting the ethnographic study such as interview schedule, observation, case study, FGD, etc. may be employed by the researcher to gather required information. FGD is a focused and guided to some extent discussions among a group of people who are generally homogenous. The people participating in the discussion may likely to be benefited and affected by or related to the issues of the research. Besides ensuring homogeneity of group in terms of age, sex, educational level and other such attributes, the criteria of related issues of social structure, local customs and group dynamics need to be considered. Camera and recorder may also be used, which help the ethnographer in recollecting of every detail of the field. These aids prove helpful in capturing the characteristically significant behavioural events in their situational contexts. However, these audio-visual aids need to be used very sensibly in a limited manner, so that the respondents did not become conscious.

### *Inter-Cultural Communication*

Establishing good rapport with the studied community is must for conducting any authentic ethnographic study. Communication plays important role in establishing rapport. Sometimes, there is a wide cultural gap between the studied community and the researcher. Here, the inter-cultural communication (communication between two cultural groups) plays important role in moving ahead. This inter-cultural communication helped a lot in one or other ways like in establishing rapport and gaining the faith of the studied community. Most importantly, the first hand, reliable data were gathered without the help of any interpreter.

The first and foremost problem in ethnographic study is communicating with the indigenous people. This is even more difficult when the studied community belongs to the PVTGs, as they are mostly illiterates, isolated from the mainstream society, shy in nature and avoiding any outside contact, hesitates in contacting and communicating others and also having less exposure to the outside world. Maintaining veracity of ethnographic study could be difficult in literal

sense, as the researcher often failed to communicate the exact purpose of the research to the respondents belonging to the indigenous population.

#### **Establishing rapport and gaining trust of the study population:**

The data for any ethnographic study in Indian setting could be collected only after establishing proper rapport with the community. In this scene the researcher may or may not be able to convince the exact purpose of the study, but gaining the trust is more important. The usual prescription for conducting any ethnographic study, or even any anthropological study, is communicating the exact purpose of the research with the study community. The researcher has to address the ethical issues which may arise out of the proposed study. It may also arise due to different cultural backgrounds and values and humanistic aspects (Tabatabaei, 2016). However ethical issues in this kind of research are also a debatable issue, as it is difficult to define its exact nature (Daniel-McKeigue, 2007). Broadly ethics can be considered as a body of moral principles or standards of human nature that conduct the behaviour of individual in correct path.

#### **Cultural differences:**

Sometimes the culture setting is also a barrier for not only the study population but the researcher as well. Even for the well-trained and well prepared ethnographers, the field situation often offers a piqued condition, as every field situation is unique and what comes in the field is unknown to the researcher. In the field situation, both the researchers as well as study population belong to different cultural backgrounds, and this varied cultural settings offers challenges for both. It is not only on the part of the study population that they show some kind of apprehension and inhibition in divulging the information, but the researcher also had some cultural inhibition in interacting freely with such group of respondents.

#### **Expectation of the community members from the researcher:**

In every anthropological fieldwork, the researcher has some definite purpose and expectations from the field situations. Sometimes this expectation is from both the sides, i.e., from researchers as well as respondents. The researcher expects quality data which is suitable to the purpose and objectives of the study. Similarly the respondents have different expectations from the researchers. This happens despite the clear communication of the purpose of the research. Lonely and aged respondents may also come to the researcher to narrate their woes and miseries and with expectation of a little help in one form or other from the researcher. Some of the questions

in the interview schedule, such as questions related to the economic condition, livelihood resources, monthly income, status of livestock in the family, etc., invite the attention of the respondents. For this, the other community members and villagers who are not included in the sample may also come to the researcher enquiring about the purpose of the visit of the researcher and some of them even request to offer their time for the interview.

To conclude, it could be said that the ethnographic study presents challenges and the stricter norms of ethical practices may sometimes ignored by the Indian ethnographers. However, there should be a middle path for conducting this type of study among the Indian aborigines, where the standard ethical practices should be considered as per the local cultural setting.

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## Caste System and Its Changing Dynamics

Rajeev Kamal Kumar (Draft -17.6.20)

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### Caste, varna and jāti: Concept & Definitions

**Varna:** Literally varna means colour, and was a framework for classifying people into classes, first used in Vedic Indian society. It is referred frequently in the ancient Indian texts. The four classes were the Brahmins (priestly people), the Kshatriyas (also called Rajanyas, who were rulers, administrators and warriors), the Vaishyas (artisans, merchants, tradesmen and farmers), and Shudras (labouring classes). The varna categorisation implicitly had a fifth element, being those people deemed to be entirely outside its scope, such as tribal people and the untouchables.

**Jāti:** Jāti, meaning birth, is mentioned much less often in ancient texts, where it is clearly distinguished from varna. There are four varnas but thousands of jātis. The jātis are complex social groups that lack universally applicable definition or characteristic, and have been more flexible and diverse than was previously often assumed. Some scholars of caste have considered jāti to have its basis in religion, assuming that in India the sacred elements of life envelope the secular aspects; for example, the anthropologist Louis Dumont described the ritual rankings that exist within the jāti system as being based on the concepts of religious purity and pollution. This view has been disputed by other scholars, who believe it to be a secular social phenomenon driven by the necessities of economics, politics, and sometimes also geography. A feature of jātis has been endogamy. Jātis have existed in India among Hindus, Muslims, Christians and tribal people, and there is no clear linear order among them.

**Caste:** The term caste is not an Indian word. According to the Oxford English Dictionary, it is derived from the Portuguese *casta*, meaning "race, lineage, breed" and, originally, "'pure or unmixed (stock or breed)". There is no exact translation in Indian languages, but varna and jāti are the two most proximate terms and being used interchangeably.

### **The origins of caste system:**

Though there are several theories, opinions and beliefs in this regard, the exact origin of caste cannot be traced. Indo-Aryans reached India about 2500 B.C. The Caste System took its birth after the arrival of Aryans in India. But it can be decidedly said that the Varnashram Vyavastha did exist before Caste System.

The caste system is basically a system of inequality. It has been described with features, such as hierarchy, occupational specialization, separation (based on the concept of purity and pollution),

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endogamy and ideology etc.<sup>1</sup> It is an arduous task to construct a systematic ethnography of the teeming millions of Indian population.

As per the 1901 census the following eight different ethnic groups are found here. 1. Pre-Dravidian 2. Dravidian 3. Indo-Aryan 4. Turko-Iranian 5. Scytho-Dravidian 6. Arya-Dravidian 7. Mongoloid 8. Mongoloid-Dravidian. India has been described as an ethnological museum. Race formation is a dynamic process and environmental stimuli have caused many changes in the ethnic types. There is a wide variety of differences in physical features, complexion and even in language. Often linguistic terms like Aryan and Dravidian have been applied to ethnic units. It is difficult to assume that this vast subcontinent was once a vacuum and the races have migrated into this ethnological paradise from faraway places. There have never been attempts to ascertain how far India bred her own races. According to some scholars, the Indian race had been classified in seven different categories in earlier age among which the Turko-Iranian, Indo-Aryan, Scytho-Dravidian type, Aryo-Dravidian type, Mongolo-Dravidian type, Mongoloid type and Dravidian type were in the list.<sup>2</sup>

The origin of caste is attributed to the Varna system initiated by the Aryans, who invaded India and conquered the natives making them the fourth Varna. Varna says that the Brahmins are born from His mouth, the Kshatriyas from His arms, the Vaishyas from His thighs and the Sudras are created from the feet of the Lord, the Purna-Purusha. Brahmins and two other Varnas are twice born (Dwij), while the fourth Varna the Sudra is born only once. "It is popularly held that in the beginning, there were only three Varnas and the fourth Varna of the Sudra is an outcome of the fight between Brahmins and Kshatriyas for the Supremacy in the Varna hierarchy." The Sudras are therefore also called "Padaja." i.e. born from the feet and therefore the lowest ones. Such divinity ascribed to Varna System and Caste System successfully survived through centuries and ages in India and drew strength from such divine theory and lived on its sustenance. Below the category of Sudras were untouchable or Panchamas (literal "fifth division, who performed the most menial task).

### **Caste system in India**

In India, the caste system is a system of social stratification and which is now also used as a basis for affirmative action. Historically, it defined communities into thousands of endogamous hereditary groups called Jātis. Contemporary usage of the term Jātis and caste are synonyms. The Jātis were grouped by the Brahminical texts under four categories, known as varnas: viz Brahmins, Kshatriyas, Vaisyas, and Sudras. Certain groups, now known as "Dalits", were excluded from the varna system altogether, ostracized by all other castes and treated as untouchables. Although strongly identified with Hindus, the caste systems has been carried over

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<sup>1</sup> Makwana, M .H. and Pais Richard, (Ed.).(2011). *Backward Classes and Social Justice*, Jaipur: Rawat Publications

<sup>2</sup> Licy A.D.(2011). *Indian society and social change*, KERALA: University of Calicut School.

to other religions on the Indian subcontinent, including Buddhists, Christians, Muslims, Sikhs. The current caste system is based on heredity and is not changeable.

Caste is commonly thought of as an ancient fact of Hindu life, but various contemporary scholars have argued that the caste system was constructed or strengthened by the British colonial government. Reservations of a certain percentage of government jobs or vacancies in educational institutes for the historically "depressed" groups have existed since the later years of British rule. These groups are together referred to as Dalits or untouchables, and Adivassi or tribal group. After India achieved independence, the composition of these two groups was finalized into lists of Scheduled Castes and Scheduled Tribes, and their protection was enshrined in the Constitution. The caste system has no legal sanction in India and discrimination against lower castes is illegal in India under Article 15 of its constitution. However, sporadic Caste-related discrimination and violence continue to be reported. Since 1950, the country has enacted many laws and social initiatives to protect and improve the socio-economic conditions of its lower caste population. These initiatives have led to many lower caste members being elected to the highest political offices.

In a review published in 1944, D.D. Kosambi noted that "Almost every statement of a general nature made by anyone about Indian castes may be contradicted." The term caste has no universally accepted definition. To some, the term caste traditionally corresponds to endogamous *varnas* of the ancient Indian scripts, and its meaning corresponds in the sense of *estates* of feudal Japan or Europe. To others, endogamous *jātis* — rather than *varnas* — are castes, such as the 2378 occupation-classified *jātis* list created by colonial ethnographers in early 20<sup>th</sup> century. To others such as Risley, castes in India mean endogamous groups that resulted from interactions between what once were different races. Endogamy, the common element in these three definitions, is itself disputed. Ambedkar disagreed that the term castes in India can be defined as endogamous groups as India was strictly exogamous society because marriage within blood-relatives and class-relations was culturally forbidden. The term caste should be defined as a social group that tries to impose endogamy, in an exogamous population.

The use of occupation to define castes is confusing as well. Brahmins have been listed as priests and sometimes rulers or other professions, Kshatriyas include warriors and sometimes rulers or other professions, Vaishyas are listed to include traders and sometimes agriculturists and other professions, while Shudras are listed to include labourers and sometimes agriculturists and other professions. Drekmeier, for example, after his study of Indian castes includes agriculturists as Vaishyas, while Goodrich includes them as Shudras. Castes are poorly defined, confusing concepts. According to William Pinch, the confusion is in part, because the very idea of hierarchical status and relative social identity has been a matter of disagreement in India. Sociologist Anne Waldrop observes that while outsiders view the term caste as static phenomena of stereotypical tradition-bound India, empirical facts suggest caste has been a radically changing feature of India.

G. S. Ghurye wrote in 1932, we do not possess a real general definition of caste. It appears that any attempt at definition is bound to fail because of the complexity of the phenomenon. Ghurye did attempt to find a middle-ground between the complexity and the loose usage. He defined **six characteristics** of the Hindu caste system as a "social philosophy", being its state prior to the relatively modern corruption of this by theories of "rights and duties". He thought that these could be applied across the country, although he acknowledged that there were regional variations.

- **Strict segmentation of the society**, with the various groups being rigidly defined and membership of them determined by birth.
- A **hierarchical system** that defines a ranking place for all of the castes
- **Limited choice of occupation**, which is enforced within a caste as well as by other castes. A caste might follow more than one traditional occupation but its members would nonetheless be constrained to that range.
- The **general practice of endogamy**, although in some situations hypergamy is acceptable. Endogamy applies to the various sub-groups within a caste itself, preventing marriage between the sub-groups and sometimes imposing an additional geographical constraint, that one can only marry a person from the same gotra and the same place.
- **Restrictions on dietary and social interactions** that define who could consume what and accept from whom. As with marriage arrangements, these restrictions apply at sub-caste level, not merely at the caste level.
- **Physical segregation** in, for example, villages. This is accompanied by limitations on movement and access, including to religious and educational areas and to basic facilities such as supplies of water. Again, this segregation applies at sub-caste level as well as at the higher level.

Not everyone has agreed with the definition proposed by Ghurye, which in any event was intended as an exercise to reduce the gap between lax terminological usage and the realities of an immensely complex system. More recently, Graham Chapman is among those who have reiterated the complexity, and he notes that there are differences between theoretical constructs and the practical reality.

### History

There are several theories regarding the origins of the Indian caste system. One posits that the Indian and Aryan classes ("*pistras*") show similarity, wherein the priests are Brahmins, the warriors are Kshatriya, the merchants are Vaishya, and the artisans are Shudras. Another theory is that of Georges Dumézil, who formulated the tri-functional hypothesis of social class- ancient

societies had three main classes, each with distinct functions: the first judicial and priestly, the second connected with the military and war, and the third class focused on production, agriculture, craft and commerce. Dumézil proposed that Rex-Flamen of the Roman Empire is etymologically similar to Raj-Brahman of ancient India.

From the Bhakti school, the view is that the four divisions were originally created by Krishna. "According to the three modes of material nature and the work associated with them, the four divisions of human society were created."

Caste can be considered as an ancient fact of Hindu life, but various contemporary scholars have argued that the caste system as it exists today is the result of the British colonial regime, which made caste organisation a central mechanism of administration. According to scholars such as the anthropologist Nicholas Dirks, before colonialism caste affiliation was quite loose and fluid, but the British regime enforced caste affiliation rigorously, and constructed a much more strict hierarchy than existed previously, with some castes being criminalised and others being given preferential treatment. From a sociological point of view Matthew Ward explains that the caste system is inherently embedded in Hindu Religious practices particularly the teachings of samsara, dharma and karma. Samsara views death as a moment of transition and not an end in any person's life. Dharma encourages the belief that our destiny (caste) is fixed and it cannot be changed. Ward says that the Hindu hyper-good has provided a faithful acceptance of ones worldly fate in order to improve one's lot in the next life cycle. Karma is responsible for punishment and reward. This force is influenced by the extent they follow their dharma.

### **During British rule**

The role of the British on the caste system in India is controversial. Some sources suggest that the caste system became legally rigid during the British Raj, when the British started to enumerate castes during the ten-year census and meticulously codified the system under their rule. Other sources suggest that the caste system existed in India prior to the arrival of the British, and enumerating classes and castes do not constitute the act of constructing it. Bouglé, for example, used 17th to 19th century historical reports by Christian missionaries and some Europeans on Indian society to suggest that a rigid caste system existed in India during and before British ruled India, quite similar in many respects to the social stratification found in 17th to 19th century Europe.

Assumptions about the caste system in Indian society, along with its nature, evolved during British rule. Célestin Bouglé, in his essay on the caste system in India, published in 1908, observed the British frequently asserting they had no interest in modifying the caste system in India. The Englishman's motto was to administer its Indian colony by preserving its customs, caste system, and with a minimum of security or justice or governance. British rule, without wanting to, was triggering fundamental social changes in India. The lower castes were becoming officials, the Brahmins were leaving religious occupations and becoming policemen and farmers,

and the three pillars of the caste system—hereditary occupation, social hierarchy and exclusionary repulsion—were crumbling. Bouglé identified the cause for these changes to be economic progress, industrialisation and career mobility. He believed that British rule, without intending to, had accelerated the natural demise of the caste system in India. Corbridge concludes that British policies of divide and rule of India's numerous princely sovereign states, as well as enumeration of the population into rigid categories during the 10 year census, contributed towards the hardening of caste identities.

In the round table conference held on August 1932, upon the request of B. R. Ambedkar, the then Prime Minister of Britain, Ramsay Macdonald made a Communal Award which awarded a provision for separate representation for the Muslims, Sikhs, Christians, Anglo-Indians, Europeans and Dalits. These depressed classes were assigned a number of seats to be filled by election from special constituencies in which voters belonging to the depressed classes only could vote. Gandhi went on a hunger strike against this provision claiming that such an arrangement would split the Hindu community into two groups. Fearing a communal reprisal and genocidal acts against untouchables, Ambedkar was coerced into agreeing with Gandhi. This agreement was called the Poona Pact.

### **Caste rigidity**

Ancient Hindu texts suggest caste system was not rigid. This flexibility permitted lower caste Valmiki to compose the Ramayana, which was widely adopted and became a major Hindu scripture. Other ancient texts cite numerous examples of individuals moving from one caste to another within their lifetimes. Fa Xian, a Buddhist pilgrim from China, visited India around 400 AD. "Only the lot of the Chandals he found unenviable; outcastes by reason of their degrading work as disposers of dead, they were universally shunned ... But no other section of the population were notably disadvantaged. In this period kings of Shudra and Brahmin origin were as common as those of Kshatriya and caste system was not wholly rigid.

**Colonial Period:** Smelser and Lipset in their review of Hutton's study of caste system in colonial India propose the theory that individual mobility across caste lines may have been minimal in British India because it was ritualistic. They theorise that the sub-castes may have changed their social status over the generations by fission, re-location, and adoption of new external ritual symbols. They further propose that the colonial system may have affected the caste system social stratification. They note that British colonial power controlled economic enterprises and the political administration of India by selectively cooperating with upper caste princes, priests and landlords. This was colonial India's highest level caste strata, followed by second strata that included favoured officials who controlled trade, supplies to the colonial power and Indian administrative services. The bottom layer of colonial Indian society was tenant farmers, servants, wage labourers, indentured coolies and others. The colonial social strata acted in combination with the traditional caste system. The colonial strata shut off economic opportunity,

entrepreneurial activity by natives, or availability of schools, thereby worsening the limitations placed on mobility by the traditional caste system. In America and Europe, they argue individual mobility was better than in India or other colonies around the world, because colonial stratification was missing and the system could evolve to become more secular and tolerant of individual mobility.

**Contemporary India:** In the present day India social organization based on caste is considered to be heredity and is not changeable. However, Inter-caste marriage is legal in India. Movements started by Gandhi and Ambedkar to decrease the inequality among people practicing caste have had a considerable effect on people's view. Sociologists such as Srinivas and Damle have debated the question of rigidity in caste. In their independent studies, they claim considerable flexibility and mobility in their caste hierarchies among the Coorgs of South India.

The Indian government officially recognises historically discriminated communities of India such as the Untouchables under the designation of Scheduled Castes, and certain economically backward Shudra castes as Other Backward Castes. The Scheduled Castes are sometimes referred to as Dalit in contemporary literature. Since 1950, India has enacted and implemented many laws and social initiatives to protect and improve the socio-economic conditions of its Dalit population. Of the highest paying, senior most jobs in government agencies and government controlled enterprises, over 10 percent were held by members of the Dalit community, a tenfold increase in 40 years but yet to fill up the 15 percent reserved quota for them.

Article 15 of Indian Constitution, as enacted in 1950, prohibits any discrimination based on caste. Article 17 of Indian Constitution declared any practice of untouchability as illegal. In 1955, India enacted the Untouchability (Offences) Act (renamed in 1976, as the Protection of Civil Rights Act). It extended the reach of law, from intent to mandatory enforcement. The Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act was passed in India in 1989.

- India created National Commission for SCs & STs to investigate, monitor, advise, and evaluate the socio-economic progress of the Scheduled Castes and Scheduled Tribes.
- India implemented a reservation system for its citizens from Scheduled Castes and Scheduled Tribes.
- In India, where the presence of private free market corporations is limited, government jobs have dominated the percentage of jobs in its economy. The reservation system implemented by India over 50 years, has been partly successful, because of all jobs, nationwide, in 1995, 17.2 percent of the jobs were held by those in the lowest castes.
- The Indian government classifies government jobs in four groups. The Group A jobs are senior most, high paying positions in the government, while Group D are junior most, lowest paying positions. In Group D jobs, the percentage of positions held by lowest caste is 30%

greater than their demographic percentage. In all jobs classified as Group C positions, the percentage of jobs held by lowest caste people is about the same as their demographic percentage and in Group A & B jobs, %age of positions held by lowest caste is lower than their demographic percentage.

- In 2007, India elected K. G. Balakrishnan, a Dalit, to the office of Chief Justice and Uttar Pradesh elected Mayawati as CM in the same year. 1997- KR Naryanan as President and in 2009 Meira Kumar, as the first female speaker of Lok Sabha.

In addition to taking affirmative action for people of schedule castes and scheduled tribes, India has expanded its effort to include people from poor, backward castes in its economic and social mainstream. In 1990, the Government of India introduced reservation of 27% for Backward Classes on the basis of the Mandal Commission's recommendations. This became the law with the issuance of Gazette notice 36012/31/90-Estt. (SCT) dated 13 August 1990. Since then, India has reserved 27 percent of job opportunities in government-owned enterprises and agencies for socially and Educationally Backward Classes (SEBCs). The 27 percent reservation is in addition to 22.5 percent set aside for India's lowest castes for last 50 years. In a 2008 study, Desai et al. focussed on education attainments of children and young adults aged 6–29, from lowest caste and tribal populations of India. They completed a national survey of over 100,000 households for each of the four survey years between 1983 and 2000. They found a significant increase in lower caste children in their odds of completing primary school. The number of dalit children who completed either middle-, high- or college-level education increased three times faster than the national average, and the total number were statistically same for both lower and upper castes. The number of dalit girls in India who attended school doubled in the same period, but still few percent less than national average.

A study by Darshan Singh presents data on socio-economic change in India's discriminated castes:

- In 2001, the literacy rate in India's lowest castes was 55 percent, compared to a national average of 63 percent.
- The childhood vaccination level in India's lowest castes was 40 percent in 2001, compared to a national average of 44 percent.
- Access to drinking water within household or near the household in India's lowest castes was 80 percent in 2001, compared to a national average of 83 percent.
- The poverty level in India's lowest castes dropped from 49 percent to 39 percent between 1995 and 2005, compared to a national average change from 35 to 27 percent.

**Scheduled castes (SC):** Scheduled castes generally consist of Dalit. By 2007, the population was 16% of the total population of India (around 165 million).

**Scheduled tribes (ST):** ST generally consist of tribal groups. The present population is 7% of the total population of India i.e. around 70 million.

**Other Backward Classes (OBC):** The Mandal Commission covered more than 3000 castes under Other Backward Class (OBC) category, regardless of their affluence or economic status and stated that OBCs form around 52% of the Indian population. However, the National Sample Survey puts the figure at 32%. There is substantial debate over the exact number of OBCs in India; it is generally estimated to be sizable, but many believe that it is lower than the figures quoted by either the Mandal Commission or the National Sample Survey.

In May 2011, the government approved a caste census with the intention of verifying the claims and counterclaims by various sections of the society about their actual numbers. The census would also help the government to re-examine and possibly undo some of the policies which were formed in haste such as the Mandal commission in order to bring more objectivity to the policies with respect to contemporary realities. Critics of the reservation system believe that there is actually no social stigma at all associated with belonging to a backward caste and that because of the huge constitutional incentives in the form of educational and job reservations, a large number of people will falsely identify with a backward caste to receive the benefits. This would not only result in a marked inflation of the backward castes' numbers, but also lead to enormous administrative and judicial resources being devoted to social unrest and litigation when such dubious caste declarations are challenged.

#### **Among religions**

Although strongly identified with Hinduism, the caste systems has been carried over to other religions on the Indian subcontinent, including small groups of Buddhists, Christians, Muslims, Sikhs.

#### **Christians**

In some parts of India, Christians are stratified by sect, location, and the castes of their predecessors. In many ways this presence of social strata system has been witnessed elsewhere, such as the society structured by Christian Spaniards who, according to Cahill, established a caste system in their colonial possessions: the West Indies, East Indies, New Spain and the Viceroyalty of Peru, within the last 500 years. The earliest reference to caste among Indian Christians comes from Kerala. Duncan Forrester observes that "... Nowhere else in India is there a large and ancient Christian community which has in time immemorial been accorded a high status in the caste hierarchy. ... Syrian Christian community operates very much as a caste and is properly regarded as a caste or at least a very caste-like group." Amidst the Hindu society, the



Saint Thomas Christians of Kerala had inserted themselves within the Indian caste society by the observance of caste-rules and were regarded by the Hindus as a caste occupying a high place within their caste hierarchy. Their traditional belief that their ancestors were high-caste Hindus such as Namboodiris and Nairs, who were evangelised by St. Thomas, has also supported their upper-caste status. With the arrival European missionaries and their evangelistic mission among the so-called lower castes in Kerala, two new groups of Christians, called Latin Rite Christians and New Protestant Christians, were formed but they continued to be considered as lower castes by higher ranked communities, including the Saint Thomas Christians.

### **Muslims**

Contrary to the Quranic worldview, Muslims in India have a caste system. Ashrafs are presumed to have a superior status, while the Ajlafs have a lower status. The *Arzal* caste among Muslims was regarded as equivalent of untouchables, by anti-caste activists like Ambedkar, and by the colonial British ethnographer Herbert Risley who claimed more than 60 percent of Muslims in British India were of a caste equivalent in status as the Hindu Shudras and Untouchables. In the Bengal region of India, some Muslims stratify their society according to 'Quoms.' Some scholars have asserted that the Muslim "castes" are not as acute in their discrimination as those of the Hindus, while other scholars argue that the social evils in South Asian Muslim society were worse than those seen in Hindu society.

### **Sikh**

Although the Sikh Gurus criticised the hierarchy of the caste system, one does exist in Sikh community. In the Shiromani Gurdwara Prabandhak Committee, 20 of the 140 seats are reserved for low-caste Sikhs.

### **Buddhists**

When Ywan Chwang traveled to South India after the period of the Chalukyan Empire, he noticed that the caste system had existed among the Buddhists and Jains. In parts of India, such as Ladakh, with significant historical presence of Buddhists, a caste system existed in a manner similar to caste structure in Tibet. The upper castes belong to *sger gzhis*, and they are called *sgar pa*. The priestly caste belonged to monastery, and is called *chos-gzhis*. *Miser* is the serf caste. Serfs, the majority of the people, farmed and paid taxes. An individual's social status and lifelong occupation was destined by birth, closed, and depending on the family one was born into, the individual inherited a tenure document known as *khral-rten*. Buddhist castes had sub-castes, such as *nang gzan*, *khral pa* and *dud chung*. Buddhist also had castes that were shunned by their community and ostracised, such as hereditary fishermen, butchers and undertakers. The untouchables in Buddhist, as in Tibet, are known as *Ragyappa*, who lived in isolated ghettos, and their occupation was to remove corpses (human or animal) and dispose of sewage.

## **Jains**

Jains also had castes in places such as Bihar. For example, in the village of Bundela, there were several exclusionary *jaats* amongst the Jains. Martin claims these castes avoided eating with each other. Walter Hamilton in his trip to the Tulava region of South India noticed that the Jains there do not accept Shudras into their sect.

## **Caste and social status**

Doctrinally, caste was defined as a system of segregation of people, each with a traditional hereditary occupation. The Jātis were grouped by the Brahminical texts under the four well-known caste categories (the varnas): viz Brahmins, Kshatriyas, Vaishyas, and Shudras. Certain people were excluded altogether, ostracised by all other castes and treated as untouchables. This ideological scheme was theoretically composed of 3000 sub-castes, which in turn was claimed to be composed of 90,000 local endogamous sub-groups.

## **Caste-related violence**

Independent India has witnessed caste-related violence. According to a UN report, approximately 110,000 cases of violent acts committed against Dalits were reported in 2005. The report claimed 6.7 cases of violent acts per 10000 Dalit people. For context, the UN reported between 40 and 55 cases of violent acts per 10000 people in developed countries in 2005.; and the total number of cases pending in various courts of India, on Dalit related and non-Dalit related matters were 31.28 million as of 2010. One example of such violence is the Kherlanji Massacre of 2006.

## **Caste politics**

B. R. Ambedkar and Jawaharlal Nehru had radically different approaches to caste, especially concerning constitutional politics and the status of untouchables. Since the 1980s, caste has become a major issue in the politics of India. The Mandal Commission was established in 1979 to "identify the socially or educationally backward" and to consider the question of seat reservations and quotas for people to redress caste discrimination. In 1980, the commission's report affirmed the affirmative action practice under Indian law, whereby additional members of lower castes—the other backward classes—were given exclusive access to another 27 percent of government jobs and slots in public universities, in addition to the 23 percent already reserved for the Dalits and Tribals. When V. P. Singh's administration tried to implement the recommendations of the Mandal Commission in 1989, massive protests were held in the country. Many alleged that the politicians were trying to cash in on caste-based reservations for purely pragmatic electoral purposes.

Many political parties in India have indulged in caste-based votebank politics. Parties such as Bahujan Samaj Party (BSP), the Samajwadi Party and the Janata Dal claim that they are representing the backward castes, and rely on OBC support, often in alliance with Dalit and Muslim support, to win elections.

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In May 2011, the government approved a poverty, religion and caste census to identify poverty in different social backgrounds. The census would also help the government to re-examine and possibly undo some of the policies which were formed in haste such as the Mandal Commission in order to bring more objectivity to the policies with respect to contemporary realities. Critics of the reservation system believe that there is actually no social stigma at all associated with belonging to a backward caste and that because of the huge constitutional incentives in the form of educational and job reservations, a large number of people will falsely identify with a backward caste to receive the benefits. This would not only result in a marked inflation of the backward castes' numbers, but also lead to enormous administrative and judicial resources being devoted to social unrest and litigation when such dubious caste declarations are challenged.

### **Distribution**

Table 1 is the distribution of population of each Religion by Caste Categories, obtained from merged sample of Schedule 1 and Schedule 10 of available data from the National Sample Survey Organisation 55th (1999–2000) and National Sample Survey Organisation 61st Rounds (2004–05) Round Survey. The Other Backward Class(OBCs) were found to comprise 52% of the

country's population by the Mandal Commission report of 1980, a figure which had shrunk to 41% by 2006 when the National Sample Survey Organisation took place.

**Table: Distribution of Population by Religion and Caste Categories**

Religion/Caste	SCs	STs	OBCs	Forward Caste/Others
Hinduism	22.2%	9%	42.8%	26%
Islam	0.8%	0.5%	39.2%	59.5%
Christianity	9.0%	32.8%	24.8%	33.3%
Sikhism	30.7%	0.9%	22.4%	46.1%
Jainism	0.0%	2.6%	3.0%	94.3%
Buddhism	89.5%	7.4%	0.4%	2.7%
Zoroastrianism	0.0%	15.9%	13.7%	70.4%
Others	2.6%	82.5%	6.25	8.7%
Total	19.7%	8.5%	41.1%	30.8%

**Criticism:** There has been criticism of the caste system from both within and outside of India.

#### *Caste and economics*

Economic inequality seems to be related to the influence of inherited social-economic stratification. In India, 36.3% of people own no land at all, 60.6% own about 15% of the land, with a very wealthy 3.1% owning 15% of the land. A 1995 study suggests that the caste system in India must be viewed as a system of exploitation of poor low-ranking groups by more prosperous high-ranking groups. Such qualitative theories have been questioned though by other studies. In a 2011 study, Aiyar notes that such qualitative theories of economic exploitation and consequent land redistribution within India between 1950 and 1990 had no effect on the quality of life and poverty reduction. Instead, economic reforms since the 1990s and resultant opportunities for non-agricultural jobs have reduced poverty and increased per capita income for all segments of Indian society.

Cassan has studied the differential effect within two segments of India's Dalit community. He finds India's overall economic growth has produced the fastest and more significant socio-economic changes. Cassan further concludes that legal and social program initiatives are no longer India's primary constraint in further advancement of India's historically discriminated castes; further advancement are likely to come from improvements in the supply of quality schools in rural and urban India, along with India's economic growth.

#### **Views of Ambedkar**

Ambedkar, was born in a caste that was classified as untouchable, became a leader of human rights in India, a prolific writer, and a key person in drafting modern India's constitution in the 1940s. He wrote extensively on discrimination, trauma and tragic effects of the caste system in

India. He described the Untouchables as belonging to the same religion and culture, yet shunned and ostracised by the community they lived in. The Untouchables recognised the sacred as well as the secular laws of India, but they derived no benefit from this. They lived on the outskirts of a village. Segregated from the rest, bound down to a code of behaviour, they lived a life appropriate to a servile state. According to this code, an Untouchable could not do anything that raised him or her above his or her appointed station in life. Thereafter, observed Ambedkar, his social status was fixed, and his economic condition was permanently set. The tragic part was that the Muslims, Parsis and Christians shunned and avoided the Untouchables, as well as the Hindus.

Ambedkar acknowledged that the caste system wasn't universally absolute in his time; it was true that some Untouchables had risen in Indian society, but the majority had limited mobility, or none, during Britain's colonial rule. According to Ambedkar, the caste system was irrational. Ambedkar listed these evils of the caste system: it isolated people, infused a sense of inferiority into lower-caste individuals, and divided humanity. The caste system was not merely a social problem, he argued: it traumatised India's people, its economy, and the discourse between its people, preventing India from developing and sharing knowledge, and wrecking its ability to create and enjoy the fruits of freedom. The philosophy supporting the social stratification system in India had discouraged critical thinking and cooperative effort, encouraging instead treatises that were full of absurd conceits, quaint fancies, and chaotic speculations. The lack of social mobility had prevented India from developing technology which can aid man in his effort to make a bare living, and a life better than that of the brute. The resultant absence of scientific and technical progress, combined with all the transcendentalism and submission to one's fate, perpetrated famines, desolated the land, and degraded the consciousness from respecting the civic rights of every fellow human being.

According to Ambedkar, castes divided people, only to disintegrate and cause myriad divisions which isolated people and caused confusion. Even the upper caste, the Brahmin, divided itself into well over 1400 sub-castes.

### **Views of Gandhi**

Gandhi, disagreed with some of Ambedkar's observations, rationale and interpretations about the caste system in India. Caste he claimed has saved Hinduism from disintegration. But like every other institution it has suffered from excrescences. He considers the four divisions of Varnas to be fundamental, natural and essential. The innumerable sub-castes or Jātis he considered to be a hindrance. He advocated to fuse all the Jātis into a more global division of Varnas. He also advocated for the idea of heredity in caste to be rejected.

He claimed that Varnashrama of the shastras is today nonexistent in practice. The present caste system is theory antithesis of varnashrama. Caste in its current form had nothing to do with religion. The discrimination and trauma of castes was the result of custom, the origin of which is

unknown. The customs' origin was a moot point, because one could spiritually sense that these customs were wrong, and that any caste system is harmful to the spiritual well-being of man and economic well-being of a nation. The reality of colonial India was, Gandhi noted, that there was no significant disparity between the economic condition and earnings of members of different castes, whether it was a Brahmin or an artisan or a farmer of low caste. India was poor, and Indians of all castes were poor. Thus, he argued that the cause of trauma was not in the caste system, but elsewhere. He acknowledged that the caste system in India spiritually blinded some Indians, then added that this did not mean that every Indian or even most Indians blindly followed the caste system. India, like any other society, cannot be judged by a caricature of its worst specimens. He also advocated that no one should have a superior status merely by virtue of the caste he was born into. Gandhi said he believes that caste system, even as distinguished from varnashrama, to be an "odious and vicious dogma." It has its limitations and defects, but there is nothing sinful about it, as there is about Untouchability.

### **Historical Criticism**

The caste system has been criticised by many Indian social reformers over India's history. For example, Jyotirao Phule vehemently criticised any explanations that the caste system was natural and ordained by the *Creator* in Hindu texts. If *Brahma* wanted castes, argued Phule, he would have ordained the same for other creatures. There are no castes in species of animals or birds, so why should there be one among human animals. In his criticism Phule added, "Brahmins cannot claim superior status because of caste, because they hardly bothered with these when wining and dining with Europeans." Professions did not make castes, and castes did not decide one's profession. Ritual occupation or tasks do not make any human being superior or inferior.

Dadabhai Naoroji (1825-1917) regarded that the Caste system had been strengthened by the British, and they had been using it in order to exploit the Indian people. He wrote: It may be said that Hindus of high caste may not respect those of lower castes in the service. Is it for the British to maintain and encourage such distinction and feeling? Or is it the mission of Britain.

Vivekananda similarly criticised caste as one of the many human institutions that bars the power of free thought and action of an individual. Caste or no caste, creed or no creed, any man, or class, or caste, or nation, or institution that bars the power of free thought and bars action of an individual is devilish, and must go down. Liberty of thought and action, asserted Vivekananda, is the only condition of life, of growth and of well-being.

### **Contemporary criticism**

The maltreatment of Dalits in India has been described by some authors as "India's hidden apartheid". Critics of the accusations point to substantial improvements in the position of Dalits in post-independence India, consequent to the strict implementation of the rights and privileges

enshrined in the Constitution of India, as implemented by the Protection of Civil rights Act, 1955. They also argue that the practice had disappeared in urban public life.

Sociologists Kevin Reilly, Stephen Kaufman and Angela Bodino, while critical of caste system, conclude that modern India does not practice apartheid since there is no state-sanctioned discrimination. They write that casteism in India is presently "not apartheid. In fact, untouchables, as well as tribal people and members of the lowest castes in India benefit from broad affirmative action programmes and are enjoying greater political power."

Allegations that caste amounts to race has been rejected by prominent scholars. Ambedkar, for example, wrote that "The Brahmin of Punjab is racially of the same stock as the Chamar of Punjab. The Caste system does not demarcate racial division. The Caste system is a social division of people of the same race." Prominent sociologists, anthropologists and historians have rejected the racial origins and racial emphasis of caste and consider the idea to be one that has purely political and economical undertones. Beteille writes that "the Scheduled Castes of India taken together are no more a race than are the Brahmins taken together. Every social group cannot be regarded as a race simply because we want to protect it against prejudice and discrimination".

Other scholars propose that caste and race based discrimination may be related. Caste system and racism have empirically been the two faces of the same coin in recent human history, in a colonial migrant society outside of India. Haviland suggests that race and caste systems are related and each a type of social stratification. Both create social classes determined by birth and fixed for life. Both are opposite of the principle that all humans are born equal, both tend to be endogamous, and offsprings are automatically members of parent's social strata.

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