

ARTHA VIJÑĀNA

JOURNAL OF THE GOKHALE INSTITUTE OF POLITICS & ECONOMICS

Articles

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Consumption Expenditure and Inequality in India**
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**The Gap between Increasing Life Expectancy and
Healthy Life Years with Reference to Selected Indian
States**
P. Devi Priya

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Artha Vijnana was started in March 1959. It is a quarterly journal of the Gokhale Institute of Politics and Economics and is a peer reviewed journal. It has been publishing papers on economics, demography and subjects allied to economics.

From September 2022, the Journal announced an expansion in its focus. The journal would hence forth have a broader and an inter-disciplinary approach. Articles in the areas of economic sociology, political economy are also welcome. *Artha Vijnana* is committed to publishing high quality research, aimed at the broad audience of academicians, practitioners and policy makers, across South Asia and beyond.

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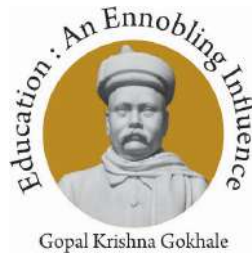
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Artha Vijñāna

June 2023 VOL. LXV No. 2



**JOURNAL OF THE
GOKHALE INSTITUTE OF POLITICS & ECONOMICS**
(Deemed to be University u/s 3 of the UGC Act, 1956)
PUNE (INDIA)

ISSN 0971 - 586 X

© Gokhale Institute of Politics and Economics
(Deemed to be University u/s 3 of the UGC Act, 1956)
BMCC Road
Pune 411 004 (India)

1. Place of Publication : Pune (India)
2. Periodicity of its Publication : Quarterly
3. Printer's Name : Ajit Ranade
(Whether citizen of India?) : Indian
(If foreigner, state the country of origin) : -
Address : Gokhale Institute of Politics and
Economics (Deemed to be University u/s 3 of
the UGC Act, 1956), BMCC Road
Pune 411 004 (India).
4. Publisher's Name : Ajit Ranade
(Whether citizen of India?) : Yes
(If foreigner, state the country of origin) : -
Address : Gokhale Institute of Politics and
Economics (Deemed to be University u/s 3 of
the UGC Act, 1956), BMCC Road
Pune 411 004 (India).
5. Editor's Name : Ajit Ranade
(Whether citizen of India?) : Yes
(If foreigner, state the country of origin) : -
Address : Gokhale Institute of Politics and
Economics (Deemed to be University u/s 3 of
the UGC Act, 1956), BMCC Road,
Pune 411 004 (India).
6. Names and addresses of individuals who : Gokhale Institute of Politics and
own the newspaper and partners or share
holders holding more than one per cent of
the total capital. : Economics (Deemed to be University u/s 3 of
the UGC Act, 1956), BMCC Road
Pune 411 004 (India).

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Announcement

Artha Vijnana announces the institution of the Gopal Krishna Gokhale Memorial Annual Prize, awarded in recognition of the paper of most outstanding merit appearing in *Artha Vijnana*, irrespective of the author's age. This prize carries an award of ₹10,000, to be shared equally between all authors. In addition, *Artha Vijnana* announces the institution of the Prof. D R Gadgil Memorial Annual Prize, awarded in recognition of the paper of most outstanding merit appearing in *Artha Vijnana*, by a single author of below 40 years of age. This prize carries an award of ₹10,000.

Announcement of prizes for the best articles published in *Artha Vijnana* in the year 2022

We are happy to announce the following:

- 1) The Gopal Krishna Gokhale Memorial Annual Prize for the most outstanding article published in it by one or more authors (irrespective of age) be awarded to Dhanya Shankar K.S. for the article entitled “*Experimental Economics and Game Theory: A Case Study*” (Vol. LXIV, No. 3, September 2022, pp. 297-311) and,
- 2) The D.R. Gadgil Memorial Annual Prize for the most outstanding article published in it by a single author below the age of 40 years be awarded to Vibha Iyer for the article entitled “*Did Indians Import Gold Only for Hoarding? A Re-Examination of Gold Flows in British India Between 1861 and 1919*” (Vol. LXIV, No. 3, September 2022, pp. 203-224).

Our heartiest congratulations to the prize winners.

Ajit Ranade
Editor

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June 2023

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Regional Estimates of Household Poverty, Consumption Expenditure and Inequality in India

Shivakumar and Niranjana R.

The study estimates household poverty by using state specific poverty line for rural and urban sectors separately, as defined by Tendulkar Methodology and estimates logistic regression for identifying the determining factors of household poverty. Taking advantage of Household Consumption Expenditure Data from the 61st (2004-2005) and 68th (2011-2012) round of the National Sample Survey, the study estimates regional level household poverty and consumption expenditure across socio-religious groups in India. In addition, the study measures household consumption expenditure and inequality by using Gini coefficient and Lorenz curves at regional level and among different socio-religious groups in India. We find that the poverty level has declined by 15.52 per cent between 2004-2005 and 2011-2012. Meanwhile across social groups, the Scheduled Caste and Scheduled Tribes households are comparatively poorer than Other Backward Classes and Others category households. Similarly, in terms of household consumption expenditure inequality, there is no significant difference in the value of Gini ratio and Lorenz curve of Monthly Per capita Consumption Expenditure between the rounds but they diverge towards the end.

Key Words: Analysis of poverty, Consumption expenditure, Inequality

I Introduction

Growth is the most critical factor in alleviating poverty and it has remained the most researched issue in the modern world. Sustained growth reduces poverty; the economic literature is firm on this point. Numerous cross-country studies (Kraay 2006, (Dollar and Kraay 2000, Chen and Ravallion 2000, (Lopez 2006) have concluded that the main determinant of poverty reduction is the pace of economic growth. However, it also appears that the relationship is reciprocal-poverty reduction is good for growth because it unleashes the productive power of the poor. Hence, the presence of poverty and inequality necessitates the augmenting of the growth process and become more balanced between regions. It is argued that growth and equity are contradictory. However, it must be recognized that there is no contradiction between the demand for equity and growth (Aggarwal 2001). The

Shivakumar, Guest Faculty, Department of Economics, Gulbarga University Kalaburagi, Post Graduate Centre, Halhalli (K) 585415, Bidar District, Karnataka, Email: shivactg1988@gmail.com
Niranjana R., Assistant Professor, Department of Studies and Research in Economics, Vijayanagara Sri Krishnadevaraya University, Ballari 583105, Karnataka, Email: niranjana@vskub.ac.in

social concern of the two can be handled together, sustaining and sustained by each other (Raza and Aggarwal 1982). For many decades, 'growth with equity and social justice' has remained on the development agenda of several developing countries.

Generally, the concept of poverty relates to socially perceived deprivation of financial well-being with respect to basic minimum needs. It is increasingly recognized that poverty is not a static concept, it is a dynamic multidimensional thought. People's experience of poverty differs depending on the depth of their poverty, as well as whether they endure poverty over a period of time, thus experiencing persistent/chronic poverty (Hume and Shepherd 2003), which has implications both for their own life course as well as for intergenerational transmission of poverty (Harper, Marcus and Moore 2003).

Current debates on poverty in developing countries have been concerned with monetary or income poverty, as well as with multidimensional concepts of relative deprivation, such as well-being, vulnerability, capability and social exclusion. The definition and conceptualization of poverty have significant implications for understanding poverty and for the design of poverty reduction policies. In recent times, social exclusion has been regarded as dynamic and effective conceptual framework for analyzing the multiple dimensions, causes and consequences of poverty. It points to the 'processes of impoverishment, structural characteristics of societies responsible for deprivation and group issues which tend to be neglected in other approaches'. In particular, the social exclusion approach is often contrasted with the monetary or income approach, which is most commonly used in policymaking. The monetary approach identifies poverty with the lack of sufficient income and it has been criticized for its narrow perception with physical needs while ignoring the structural causes of poverty.

In India, planned intervention in the poverty scenario can be traced back to the beginning of the planning period in the early 1950s. The government has not only worked for accelerating economic growth and development through five years plans, but it has also been implementing several anti-poverty schemes such as community development programs in 1952 to The National Rural Employment Guarantee Act in 2006 and also engaged poverty in a multidimensional aspect by focusing on social exclusion issues and integrating that with poverty, which is a theme of 11th five year plan, the inclusive growth and the same strategy is continued in the 12th five year plan as well. Despite all these developmental policies, according to the World Bank estimates in 2011, based on 2005's Purchasing Power Parity (PPP) 23.6 per cent of Indian population or about 276 million people live below \$1.25 per day. According to The United Nations Millennium Development Goals (MDG) programme, 270 million or 21.9 per cent people out of 1.2 billion populations live below the poverty line of \$1.2 in 2011-2012. This percentage of population is considered to be poor on an international criterion suggested by World Development Report (World Bank 2012). In October 2015, the World Bank updated the International Poverty Line (IPL) to \$1.90 a day based on International Comparison Programme Purchasing Power Parity (PPP),

indicating the international equivalent of what \$1.90 a day could buy in United States in 2011. The new IPL replaces the \$1.25 per day figure, which used 2005 data. Recently, the World Bank found that the global extreme poverty rate fell to 9.2 per cent in 2017, from 10.1 per cent in 2015. That means 689 million people are living on less than \$1.90 a day and this 10.1 per cent fell from 11.2 per cent in 2013. At a larger poverty line, 24.1 per cent of the world's people are living on less than \$3.20 a day and 43.6 per cent on less than 5.50 per cent a day in 2017¹.

The earnest Planning Commission in 1979 estimated household poverty using Household Consumption Expenditure Data collected by the National Sample Survey Office (GOI 1979). It defines the poverty line, based on monthly per capita consumption expenditure (MPCE). The existing all India rural and urban poverty lines, in the per capita calorie norms of 2400 (rural) and 2100 (urban) were originally defined in terms of per capita total consumer expenditure at 1973-1974 market prices and adjusted over time across states for changes in prices. The all India poverty line so defined in 1973-1974 was ₹49.63 for rural areas and ₹56.64 for urban areas. The methodology for the estimation of poverty has been based on their commendations made by the Expert Group headed by Suresh D. Tendulkar which submitted its report on December 2009; according to it, the poverty lines at all India levels based on MPCE is ₹447 for rural areas and ₹579 for urban areas in 2004-2005. The all India poverty line for 2004-2005 adjusted for prices was ₹356.30 for rural areas and ₹538.60 for urban areas. For the year 2009-2010, the planning commission has defined the poverty line as ₹22.40 per capita per day in rural areas and ₹28.60 per capita per day in urban areas. This translates to ₹672.80 per capita per month in rural areas and ₹859.60 per capita per month in urban areas. Based on these cut-offs, the percentage of people living below the poverty line in the country has declined from 45.3 per cent in 1993-1994 to 37.2 per cent in 2004-2005 and further declined to 29.8 per cent in 2009-2010. Even in absolute terms for the period 2004-2005 to 2009-2010, the number of poor people has fallen by 52.4 million. Of this, 48.1 million are rural poor and 4.3 million are urban poor. Thus, poverty has declined on an average by 1.5 percentage points per year between 2004-2005 and 2009-2010. Similarly, MPCE (at constant prices) has also increased from ₹558.78 and ₹1052.36 during 2004-2005 to ₹707.24 and ₹1359.75 in 2011-2012 in rural and urban areas respectively. The improvement in these social indicators is a reflection of a fall in deprivation. But ironically even after the elapse of seventy years after independence about one-third of our total population still suffers from abject poverty and a large section of poverty afflicted people is entangled by the poverty trap, i.e., they suffer from chronic poverty. The incidence as well as intensity of poverty, has also been reflected in its various dimensions, viz., the social, regional, occupational, ethnical, etc., in both rural and urban areas of our economy. Considerable attention was devoted in the past to analyzing poverty and social inequality in India at the national and state levels and also to devise state level plan allocations (Mishra and Joshi 1985) (Kurian 2000) (Gulati 1977). However much less is done at district or sub-regional levels, though the earnest Planning Commission has long back emphasized district level planning

(Aziz 1993). Meanwhile, the center of attention of much of the literature has been on vertical poverty and inequality, i.e., Inequalities across income or expenditure classes. In a plural society like India, with people of different castes and religions, it is equally important to focus on 'horizontal inequalities', i.e., disparity between different and certain identifiable social groups in the economy, at the state level and sub-regional level.

The important value addition of the study to the existing list of literature on household poverty is that it examines the extent, and intensity of household poverty and consumption expenditure covering two quinquennial rounds at regional level among socio-religious groups. The study makes use of various state-specific poverty lines based on the Tendulkar Methodology for both rural and urban sectors separately. The study covers 35 states into Six NSS regions² classified by NSSO and compares the 61st (2004-2005) and 68th (2011-2012) rounds of NSSO Data. The rest of the paper is structured as follows. Section II introduces the poverty estimation methodologies in India, Section III presents a brief review of the literature, Section IV discusses data, methodology and econometric specification and identification, and Section V deals with a comprehensive empirical analysis of poverty in India. Finally, the last section concludes with policy implications.

II Poverty Estimation Methodology in India

In India, Dadabhai Naoroji was the first person to discuss the concept of poverty. After independence, there have been several efforts to develop mechanisms and methodologies to construct the poverty line and identify the number of poor in the country. In 1962, the Planning Commission³ constituted the working group to define the poverty line based on minimum calorie requirements suggested by the Indian Council for Medical Research (ICMR) which is 2,200 kl for rural and 2,100 kl for urban areas. The monetary value of these calories for a family of five people was fixed at ₹100 per month or ₹20 per capita, per month in 1960-1961 prices in urban areas.

In 1979 the Planning Commission constituted the Task Force Committee to estimate the percentage of population below the poverty line; the committee fixed 2400 kl per capita, per day in the rural area and 2100 kl per capita, per day in the urban area and estimated ₹49.09 and ₹56.64 monthly per capita for all India for both rural and urban sectors. Planning Commission (1984) did not re-define the estimation methodology of poverty, it adopted the methodology of the earlier task force committee, and accordingly fixed ₹89.50 and ₹115.65 as Monthly Per capita Consumption Expenditure (MPCE) for rural and urban area sectors as particularly. Estimates 45.65 per cent rural, 40.79 per cent of urban, and overall 44.48 per cent of the population is below the poverty line in India. Later in 2005, the Planning Commission constituted the expert group under the chairmanship of Suresh D. Tendulkar. The committee did not construct a poverty line but they espoused earlier expert group of Lakdawala methodology and the committee fixed ₹447 and

₹579 per capita per month consumption expenditure for both rural and urban sectors which is based on minimum calorie requirements as 2100 calorie for rural and 1776 calories for urban sector. The Rangarajan Committee (2012) computed the poverty level based on average requirements of calories of 2,155 kcal per person, per day, for rural areas and 2,090 kcal per person, per day, for urban areas⁴. According to the estimates of Rangarajan, there are 30.9 per cent (260.5 million poor people) in the rural area and 26.4 per cent (102.5 million poor people) of the population is below the poverty line in urban areas and overall 29.5 per cent (363 million people) at all India level of population is poor.

III Literature Review

Many scholars examined the distributional aspects of household poverty and consumer expenditure. Moreover, the inadequacy of data on households and increasing interest in the size distribution of income and inequality has made the researchers rely heavily on sample surveys, especially those conducted by NSS. Mehtabul (2009) in his study examined the differences in welfare, as measured by Per Capita Income across the social groups in rural India by using NSS household consumption expenditure of the 61st round (2004-2005). The study reveals Scheduled Tribes households are most deprived in income existing across the entire welfare distribution followed by SC and OBC with respect to general category households. The study suggests that government policies must raise the human capital and increase effective assets of the SC and ST households especially in the rural sector. Panagariya and Mukim (2013) provided a comprehensive analysis of poverty for 17 larger states in the country, by estimating poverty (headcount ratio) for rural and urban sector and for socio-religious groups by using two official poverty lines based on Lakdawala and Tendulkar Methodology. The study, during 1993-1994 and 2009-2010, found poverty declining for various social and religious groups in all the states, secondly the reduction of poverty is larger in scheduled caste and scheduled tribes than the other backward class. Gupta and Mishra (2014) in their study examined food consumption pattern across selected social and economic groups and identified food consumption regions in India. The study was also done to show determinants of food item wise consumption pattern in the rural sector in India. The study argues that, such disaggregated measures bring out the multiplicity in food consumption patterns and helps identifying the socio-economic groups suffering from deprivation in food consumption. Arora and Singh (2015) by using unit level NSSO household consumption expenditure data of 61st (2004-2005) and 68th (2011-2012) round, estimated regional as well as disaggregated levels of poverty for socio-religious groups, for both rural and urban sector of Uttar Pradesh (UP). The study classified the state into different regions and identified critical poverty affected regions in UP across socio-religious groups. The study also made use of logistic regression to identify the determining factors of poverty and found the level of poverty across the central region, southern region and eastern region is unfairly distributed.

Sumedha and Meenakshi (2015) in their study, measured the link between inequality in physical infrastructure in 17 major states in India, both rural and urban sectors, by using the household consumption expenditure survey of 38th (1983), 50th (1987-1988), 61st (2004-2005) and 66th (2009-2010) round of NSSO respectively. The study also measured Inequality in per capita net state domestic product (NSDP) by using the Gini coefficient and it shows the impact of infrastructure on consumption inequality across the states. Datt, Gaurav, Martin Ravallion and Rinku Murgai (2016) by using a newly constructed dataset of poverty estimates for India and covering 60 years, including 20 years since the economic reforms of 1991. The study found that, acceleration of poverty declined since 1991, in spite of the rising inequality. Post-1991, growth was at least as pro-poor as in the previous decades and growth in the secondary and tertiary sectors of the economy, drove the bulk of the post-1991 poverty to decline in the urban sector. Roy (2017) in his study examined the status of hunger across major states of India, by conceptualizing it in terms of calorie under-nourishment. The study also estimated multivariate analysis in the form of logistic regression to explore the determinants of hunger and found that it was negatively and significantly influenced by per-capita food grain production, while it was positively and significantly affected by poverty, price level, and economic growth. Maitra and Menon (2019) measure the pattern and correlate excess weight of adults in India by using panel data. In their study they found urban women are predominantly at risk of being overweight and income or wealth, comparative inequality and lifestyle choices strongly correlated with body mass index. Balasubramaniam, Divya, S. Chatterjee and B. David Mustard (2019) measure the relationship among access to drinking water, sanitation facility and health outcomes for children in India by using NFHS 2015-2006 household survey data to construct nutritional distribution and health measures for children ages of below 2 years. By estimating regressions approach, they found public goods such as piped water are not associated with improving child health outcomes. Further rural children at the lower nourishing distribution, benefit much more than urban children. Especially in rural areas, children are progressive evidence against 'one-size-fits-all' policies, private sanitation and mother education and for children in the middle of the restrictive nutritional distribution.

There exist several studies on assessments and determinants of poverty, both at macro and micro level, inter-regional studies focusing on spatial divergence in poverty. Most of the empirical works on poverty and inequality are examined through regional disparity. However, with respect to India, there are a few empirical studies focusing on regional poverty and inequality within the state and linking the same to poverty and inequality. However, the empirical analyses on poverty and consumption expenditure focusing on regional level across socio-religious groups are merged. The current study with respect to India fills this gap, by analysis of the regional level across socio-religious groups in the country.

IV Data and Methodology

The study estimates household poverty at regional level, across socio-religious groups for various NSS regions by 61st and 68th rounds of MPCE data surveyed by National Sample Survey Organization. The study compares 61st and 68th round of quinquennial surveys, based on this comparison of two surveys, the poverty levels are compared to Six NSS regions classified by National Sample Survey Office, i.e., Northern Region⁵, Central Region⁶, Eastern Region⁷, North Eastern Region⁸, Western Region⁹ and Southern Region¹⁰ states in the country. NSS provides monthly per-capita expenditure data for three reference periods: Uniform Recall Period (URP), Mixed Recall Period (MRP), and Modified Mixed Reference Period (MMRP)¹¹. The URP or MRP-based consumption data are available in the 61st Round in 2004–2005, the 66th Round in 2009–2010, and the 68th Round in 2011–2012. On the other hand, MMRP-based consumption data are available only in the 66th and 68th NSS Rounds. Only the 61st Round and 68th Round data are considered by taking MRP-based consumption expenditure data, as MRP-based estimates capture the household poverty and consumption expenditure of poor households on low-frequency items of purchase more satisfactorily than does the URP data.

The study using MPCE of MRP to measures incidence of mean poverty, i.e., Head Count Ratio (Hp): which is measured as the “Percentage of population which is below the poverty line.

- *Head Count Ratio (H_p): The number of poor estimated as the proportion of people below the poverty line is known as Head Count Ratio and it is calculated by dividing the number of people below the poverty line, by the total population.*

$$H_p = \frac{n}{N} \quad \dots(1)$$

H_p = Headcount ratio, n = Number of people below poverty line and N = Total population. For estimating the household poverty, the study makes use of state wise specific poverty line, based on Tendulkar Methodology for rural and urban sectors separately¹². In addition, the study used binomial Logit or Probit regression model since it is an appropriate technique to observe the likelihood of a household for being poor or a risk of the household on entering or escaping poverty. The study also measures household MPCE and consumption inequality by using Gini coefficient and Lorenz curves for estimating Income/consumption inequality at regional level across socio-religious groups in India.

- *Gini Coefficient: It is used to measure inequality, in income or wealth distribution among a population. The Lorenz curve is a graphical representation of inequality developed by American economist Max Lorenz in 1905. The Gini Ratio lies between 0 to 1, 0 represents perfect income equality and 1 represents perfect income inequality*

Formally, the Lorenz curve can be expressed, as let in x_i be a point on the X-axis, and y_i a point on the Y-axis. Then

$$Gini = 1 - \sum_{i=1}^N (x_i - x_{i-1})(x_i + x_{i-1}) \quad \dots(2)$$

The National Sample Survey of “Consumer Expenditure” (Schedule 1.0) was conducted in the 61st Round in 2004–2005, considering 124,644 sample households in India (79,298 in rural areas and 45,346 in urban areas), which represent 609,736 persons/individuals total (403,207 in rural areas and 206,529 in urban areas). On the other hand, the NSS of ‘Consumer Expenditure’ (Schedule 1.0, Type 1) in the 68th Round, 2011–2012 was surveyed by considering 101,662 households (59,695 in rural areas and 41,967 in urban areas), which consist of 464,960 individuals/persons (285,796 in rural areas and 179,164 in urban areas). The average Monthly Per capita Consumption Expenditure (MPCE) of 2004–2005 in current prices was ₹579 and ₹1105, in rural and urban areas, respectively. On the other hand, the average MPCE of 2011–2012 in current prices was ₹1287 and ₹2477, in rural and urban areas respectively (Tripathi Sabyasachi 2018). Due to unavailability of recent NSSO survey of household MPCE data, the study is limited to only 61st and 68th rounds.

V Household Poverty in India: Empirical Analysis

Table 1: Incidence of Household Poverty in India

Round/Sector	Rural	Urban	Total
61 st Round (2004-05)	42.58	25.57	38.27
68 th Round (2011-12)	26.24	14.01	22.75
Declined	16.34 (2.33)	11.56 (1.65)	15.52 (2.21)

Note: () Change in per cent of poverty per annum.

Source: Authors estimate based on 61st and 68th round of NSS data.

Table 2: Incidence of Household Poverty across Social Groups

Social Groups	Rural			Urban			Total		
	61 st	68 th	Change	61 st	68 th	Change	61 st	68 th	Change
ST	64.61	48.23	-(2.34)	37.08	25.51	-(1.65)	62.25	45.70	-(2.36)
SC	54.09	32.11	-(3.14)	40.36	21.91	-(2.63)	51.31	29.87	-(3.06)
OBC	40.69	23.55	-(2.44)	30.32	15.95	-(2.05)	38.41	21.50	-(2.41)
Others	27.26	15.60	-(1.66)	16.10	8.16	-(1.13)	23.06	12.54	-(1.50)
Total	42.58	26.24	-(2.33)	25.57	14.01	-(1.65)	38.27	22.75	-(2.21)

Note: () Change in Percentage per annum.

Source: Authors estimate based on 61st and 68th round of NSS data.

Table 1 reveals that rural poverty is higher compared to urban poverty in India. The study found that, 42.58 per cent of rural households are poor, which is

higher than 25.57 per cent of urban poverty in 2004-2005. Meanwhile, in 2011-2012, the rural poverty it came down to 26.24 per cent and the urban poverty declined to 14.01 per cent. As a country as a whole, the household poverty declined by 15.52 per cent for the period from 2004-2005 to 2011-2012.

Table 2 brings out social group wise household poverty; the results in the table show that, between 61st and 68th round, poverty declined across various social groups. The study found higher poverty in scheduled tribes and scheduled caste than the OBC and others in the country. During the period, poverty decline is highest among the scheduled caste, is 3.06 points per annum followed by OBC which is 2.41 points per annum, scheduled tribes is 2.36 points per annum and others is only 1.50 points per annum, for both rural and urban sector.

Table 3: Level Household Poverty at Religious Groups

Religions Groups	Rural			Urban			Total		
	61 st	68 th	Change	61 st	68 th	Change	61 st	68 th	Change
Hindu	42.97	26.59	-(2.34)	23.12	12.52	-(1.51)	38.22	22.78	-(2.20)
Muslim	44.51	26.95	-(2.50)	41.20	22.78	-(2.63)	43.42	25.49	-(2.56)
Total	43.15	26.64	-(2.35)	26.27	14.35	-(1.70)	38.92	23.16	-(2.25)

Note: () Change in Percentage per annum.

Source: Authors estimate based on 61st and 68th round of NSS data.

Table 3 shows that among the religious groups, where Muslim households are comparatively poorer in the country compared to Hindus, it has been noted that, Muslims are also significantly deprived educationally and marginalized occupationally. In the 61st round, the study found Muslim households have higher poverty by 43.42 per cent whereas the level of poverty among Hindu households is 38.22 per cent. Meanwhile, in 68th round as well, higher household poverty is found in Muslims households to the tune of 25.49 per cent, compared to Hindu households of 22.78 per cent, for both rural and urban sector.

The National level poverty has been illustrated by the author for 61st (2004-2005) and 68th (2011-2012) round and it is mapped separately in the below Figures 1 and 2.

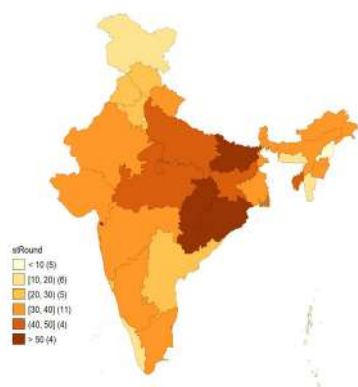
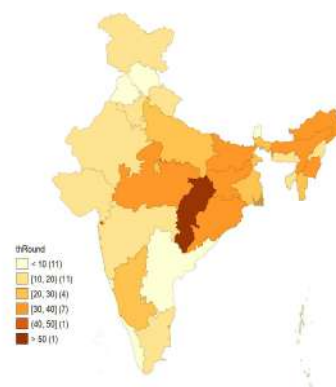
Figure 1: Poverty Level @ 61st (2004-05) RoundFigure 2: Poverty Levels @ 68th (2011-12) Round

Table 4: Region-wise Poverty across Socio-Religious Groups

Socio-Religious Groups	ST		SC		OBC	
	61 st	68 th	61 st	68 th	61 st	68 th
Northern	54.47	34.93	41.61	18.57	26.68	9.51
Central	79.40	60.22	57.62	42.00	45.85	32.44
Eastern	68.29	55.03	56.88	35.21	49.37	29.96
North Eastern	27.37	25.63	43.72	25.23	31.42	30.94
Western	62.02	44.82	49.76	19.49	39.59	15.76
Southern	55.02	26.66	45.03	19.77	27.18	10.82
Total	62.25	45.7	51.31	29.87	38.41	21.5

Socio-Religious Groups	Others		Hindu		Muslim	
	61 st	68 th	61 st	68 th	61 st	68 th
Northern	11.31	4.76	27.62	12.79	26.07	12.98
Central	24.09	13.45	46.03	33.18	47.38	33.98
Eastern	32.31	18.54	45.71	28.88	52.38	31.10
North Eastern	35.98	31.32	28.93	26.66	49.71	38.49
Western	23.06	9.04	35.74	17.09	42.77	16.51
Southern	15.81	8.63	29.92	13.05	28.04	11.90
Total	23.06	12.54	38.22	22.78	43.42	25.49

Source: Author's estimate based on 61st and 68th round of NSS data.

Table 4, presents NSS region and socio-religious group-wise levels of poverty in India. The results reveal that higher levels of household poverty among socio-religious groups are particularly found in districts of North Eastern, Central and Western region. Meanwhile, comparatively lower levels of household poverty is found in Western, Northern and Southern region states, for both rural and urban sector, during the study period 2004-2005 to 2011-2012.

VI Logistic Regression

Poverty determinants are usually estimated by using Probit or Logit model. In Probit or Logit model¹³, dichotomous variables are used which represents whether a household is poor or not. This dichotomous variable is regressed on a set of supposed explanatory variables like region, educational level, asset ownership, household size, religious groups, occupation and composition of households etc. Specifically, certain explanatory variables could be identified which are significantly associated with being poor or non-poor (Baulch and McCulloch 1998). In this study, the Logit model was used to find the determinants of rural poverty with the help of poverty status. The Logit or Probit regression model is the appropriate technique to observe the likelihood of a household for being poor or non-poor. To identify key determinants of poverty we first computed a dichotomous variable indicating whether the household is poor or not. That is,

$$\text{Poor} = \begin{cases} 1, & \text{if household is poor} \\ 0, & \text{if household non-poor} \end{cases}$$

A Logistic regression model is a univariate binary model. For dependent variable Y_i , there are only two values one and zero, and a continuous independent variable X_i , that

$$P_r (Y_i=1) = F (x'ib) \quad \dots(3)$$

Here b is a parameter that needs to be estimated and F is logistic cdf. The basic formula application of Logit model is:

$$P1 = F (\alpha + \beta xi) = \frac{1}{[1+e^{-(\alpha+\beta xi)}]} \quad \dots(4)$$

Where xi is the probability that i^{th} households will be poor given Y_i , where α is a vector of explanatory variables. e is the base of natural logarithm. Equation 5 can be written as:

$$P_i [1 + e^{-(\alpha+\beta xi)}] = 1 \text{ Or} \quad \dots(5)$$

$$\alpha + \beta xi = \log \left(\frac{P_i}{1-P_i} \right) \quad \dots(6)$$

The ration $\left(\frac{P_i}{1-P_i} \right)$ is called the log odd or Logit, which acts as the dependent variable

This ratio will give the odds of a household, whether it is poor or not. A positive sign of estimated coefficients would mean that the probability of being

poor is higher than reference category and vice versa keeping all other characteristics constant. Putting it another way “A number greater than one of log odds indicates a positive association between independent and dependent variable, while a number between Zero and one indicates negative association among both” (Hoffmann and P. Johan 2004). In equation 6, the coefficient gives the change in log odds of the dependent variable, not the changes in the dependent variable itself. Therefore, to make the interpretation straightforward, a logistic can be converted to the odds ratio, using exponential function (Joshi N.P. 2012). The functional form of odds ratio can be given as equation

$$\text{Odds ratio} = \left[\frac{p_i}{1-p_i} \right] = e^{\alpha + \beta_1 X_{1i} + \beta_2 X_{2i} + \beta_3 X_{3i} + \dots + \beta_n X_{ni} + \epsilon_i} \quad \dots(7)$$

Here, the odds ratio is simply the ratio of the probability that the household will be poor to the probability that the household will be non-poor. In case of binary independent variables, exponential of the respective coefficient, gives the proportion of change odds for shift in the given independent variable. However, if the independent variable is continuous exponential of coefficient, it is associated with the effect of per unit change in the given independent variable to the odds ratio. In both type of variables, the sign of coefficient reveals the direction of change.

Empirical results based on the estimation of econometric model and trend in household poverty head counts, the main objective of the econometric model was to determine the factor affecting poverty status in the country (Hashmi A. 2008).

The Particulars of the Regression are as Follows

- *Dependent variable* - A dummy variable called poor is created, which takes the value '1' if the individual is poor and the value '0' if he or she is non-poor.
- *Independent variables* – Sector, Social Groups, Religious Groups, Age, Regional Level, Education Level, Household Occupation and Land poses/holding.

The final model applied is as below:

$$\text{Logit} (Z_i) = \alpha + \beta_1 X_1 + \beta_2 X_2 + \beta_3 X_3 + \beta_4 X_4 + \beta_5 X_5 + \beta_6 X_6 + \beta_7 X_7 + \beta_8 X_8 \quad \dots(8)$$

Where:

X₁= Sector,

X₂=Social Groups,

X₃=Religious Groups,

X₄= age,

X₅=Regional Level,

X₆= Education Level,

X_7 = Household Occupation and

X_8 =Land poses/holding.

This logistic regression equation was arrived at, using a forward stepwise selection method. Using the data, the logistic regression has been estimated to determine the factors affecting poverty in India. Below table 5, exhibits that the probability of a household being poor in urban sector is an almost equal probability of falling under poverty to the (Rural) reference group.

Among the social groups, the Scheduled Caste and OBC category being poor were compared to the reference group of Scheduled Tribes but the other category households have low probabilities of falling under poverty, this results is evidenced for both the rounds. The Muslim household is also found to have higher poverty and the same is statistically significant at one per cent, for both 61st and 68th rounds.

The household size also has strong positive relationship with the poverty status, as well the household occupation in both 61st and 68th rounds. The male and female adults, aged between 19 to 30 years and 31 to 45 years have strong positive relations with poverty status. The study also shows, the NSS region-wise levels of poverty, wherein the households of Central, Eastern and North Eastern Regions in 2004-2005 have higher probability of falling under poverty, in comparison to the reference region – the Northern region. However, in relation to 61st round estimates the probability of households falling under poverty, during 68th round have shot-up in Central (3.3947), Eastern (2.578) and North Eastern (3.14) region. Similarly, during the same period the probability levels of household poverty declined in western (1.56) and southern regions (0.9217). In addition, in 68th round compared to the reference region the probability levels of household poverty is significantly higher in Central, Eastern, North Eastern regions and it is lower in southern regions.

The education variable also showed a significant positive correlation with poverty status. The levels of education is a vital factor, which influences the chance of being poor and non-poor, and there is less chance to falling under poverty if the household head has primary-secondary and higher levels of education. Another important aspect of these results is that the basic education has a strongly negative impact on poverty status; however, the extent of poverty for below primary level of education, is greater and statistically significant.

Table 5: Results of Logistic Regression Analysis

Logistic Regression	61 st Round (2004-05)				68 th Round (2011-12)			
	Odds Ratio	Std.Err.	Z	P> Z	Odds Ratio	Std.Err.	Z	P> Z
	Number of obs=109866 LR chi2(20)=19409.45 Prob> chi2=0.0000 Pseudo R2=0.1434 Log likelihood = -57992.006				Number of obs=90163 LR chi2(20)=10927.21 Prob> chi2=0.0000 Pseudo R2=0.1379 Log likelihood = -34148.356			
Poor (Dependent variable)								
<i>Sector (Reference: Rural)</i>								
Urban	1.1743	0.0201	9.38	0.0*	1.8522	0.0422	27.05	0.0*
<i>Social Group (Reference: Scheduled Tribes)</i>								
Scheduled Caste	0.6916	0.0199	-12.78	0.0*	0.6148	0.0215	-13.9	0.0*
Other Backward Class	0.5349	0.0140	-23.74	0.0*	0.4955	0.0157	-22.13	0.0*
Others	0.2985	0.0084	-42.54	0.0*	0.3001	0.0107	-33.72	0.0*
<i>Religion Group (Reference: Hindu)</i>								
Muslim	1.3968	0.0303	15.38	0.0*	1.2062	0.0341	6.62	0.0*
<i>Age Group (Reference: <18)</i>								
19-30	0.6409	0.0607	-4.69	0.0*	1.0684	0.0157	0.45	0.653
31-45	0.6374	0.0595	-4.82	0.0*	1.2080	0.1762	1.30	0.195
46-60	0.4503	0.0422	-8.50	0.0*	0.9485	0.1387	-0.36	0.718
>60	0.0445	0.0422	-8.52	0.0*	1.0260	0.1504	0.18	0.861
<i>NSS Regions (Reference: Northern Region)</i>								
Central Region	2.6448	0.0698	36.82	0.0*	3.3947	0.1199	34.6	0.0*
Eastern Region	2.5517	0.0675	35.41	0.0*	2.5780	0.0929	26.26	0.0*
North Eastern Region	2.0908	0.0670	23.01	0.0*	3.0142	0.1277	26.04	0.0*
Western Region	1.9790	0.0588	22.94	0.0*	1.5665	0.0664	10.58	0.0*
Southern Region	1.1140	0.0298	4.03	0.0*	0.9217	0.0360	-2.08	0.037
<i>Education Level (Reference: Not Literate)</i>								
Lite With For School	0.5496	0.0331	-9.93	0.0*	1.0044	0.1558	0.03	0.977
Below Primary	0.7192	0.0180	-13.17	0.0*	0.8363	0.2678	-0.56	0.577
Primary to Middle	0.4691	0.0082	-43.01	0.0*	0.7155	0.0218	-10.95	0.0*
Sec to Higher Sec	0.1708	0.0041	-73.42	0.0*	0.3887	0.0089	-41.04	0.0*
Graduate and Above	0.0427	0.0049	-27.11	0.0*	0.0756	0.0045	-42.74	0.0*
<i>Household Occupation (Reference: Self-Emp-non-agri)</i>								
Agricultural-labour	1.1438	0.0226	6.78	0.0*	0.8981	0.0235	-4.09	0.0*
Other-labour	1.6054	0.0371	20.44	0.0*	1.2855	0.0392	8.23	0.0*
Casual labour	--	--	--	-	2.4672	0.0989	22.51	0.0*
Self-Emp-agri	0.6154	0.0137	-21.79	0.0*	1.8618	0.0635	18.22	0.0*
Others	0.6299	0.0172	-16.85	0.0*	0.7297	0.0337	-6.82	0.3
<i>Land Poses/Ownership/Holding in hectare (Reference: 0.001-0.004)</i>								
0.005-0.400	0.9230	0.0212	-3.45	0.001	.9156	0.0286	-2.82	0.005
0.410-1.000	0.9367	0.0290	-2.10	0.035	.9269	0.0399	-1.76	0.079
1.001-2.000	0.8768	0.0318	-3.61	0.0*	.9114	0.0466	-1.81	0.070
2.001-4.000	0.7875	0.0340	-5.52	0.0*	.6602	0.0042	-6.45	0.0*
>4.001	0.0633	0.0291	-9.94	0.0*	.5420	0.0421	-7.88	0.0*

Notes: *, **, ***, Significance at one per cent, five per cent and 10 per cent degree of precision respectively.

Source: Author's estimate based on 61st and 68th round of Household Consumption Expenditure Data from NSSO.

However, the likelihood of being poor is more for a household head being an agricultural and other labor (household occupation). There was higher chance of being poor for a household if they agricultural and casual labors. The land holding or ownership also shows significant positive relationship with poverty. The land holding is one of the important determining factors of poverty, lower the land holding, there will higher the probability of being poor in rural sector.

VII Monthly Per-Capita Consumption Expenditure (MPCE) in India

Consumption is an important activity performed by the household sector and it has always been a strong and major driver of growth in the economy and it is the most important component of GDP. The study intended to examine the level of household monthly per-capita consumption expenditure, sector wise and regional level among social groups in India.

Table 6: Consumption Expenditure (MPCE) in India

Round/Sector	Rural	Urban	Total
61 st Round (2004-05)	579.17	1104.60	712.19
68 th Round (2011-12)	1287.17	2477.02	1627.13

Source: Author's estimate based on 61st and 68th round of NSS data.

The study also estimates household average monthly per-capita consumption expenditure of 61st and 68th rounds, for both rural and urban sectors separately. The Table 6 reveals the lower MPCE found in 61st round is ₹712.19 of both rural (₹579.17) and urban sector (₹1104.60). In 68th round it has increased in double proportion to ₹1627.13 of rural (₹1287.17) and urban (₹2477.01) sector respectively.

Table 7: Consumption Expenditure across Social Groups

Social Groups	Rural		Urban		Total	
	61 st Round	68 th Round	61 st Round	68 th Round	61 st Round	68 th Round
ST	446.4	999.3	925.9	1988	487.5	1109
SC	493.7	1137	794.2	1837	554.5	1291
OBC	574.1	1289	918.9	2118	650.0	1513
OTHERS	712.0	1558	1366	3122	958.4	2202
Total	579.2	1287	1105	2477	712.2	1627

Source: Author's estimate based on 61st and 68th round of NSS data.

Table 7 study estimated household monthly per capita consumption expenditure among the social groups for rural and urban sector separately. In 61st round, the average monthly per capita consumption expenditure is low in among Scheduled Tribes households with ₹487.5 followed by Scheduled Caste - ₹554.5 and OBC - ₹650, but the other category households have a higher consumption

expenditure of ₹958.4 per month. Meanwhile, in 68th round the MPCE has increased among all the social groups. However, lower MPCE is found among ST households with ₹1109/month followed by SC households -₹1291, the OBC households have ₹1513 and other households have higher the MPCE of ₹2202 respectively.

Table 8: Consumption Expenditure among Religious Groups

Social Groups	Rural		Urban		Total	
	61 st Round	68 th Round	61 st Round	68 th Round	61 st Round	68 th Round
Hindu	568.5	1269	1139	2575	704.9	1623
Muslim	552.5	1206	804.1	1783	635.1	1408
Total	566.5	1261	1080	2434	695.5	1592

Source: Author's estimate based on 61st and 68th round of NSS data.

Table 8 shows that, among the religious groups, Muslim households have comparatively lower MPCE than the Hindu households for both 61st and 68th rounds. In 61st round, the Muslim households have the MPCE of ₹635.1/month and Hindu households' MPCE is ₹704.9. Similarly, in 68th round, the MPCE among the Muslim households is ₹1408 and the Hindu households' is of ₹1623 respectively.

Table 9: Region-wise Consumption Expenditure in India

Regions	Rural		Urban		Total	
	61 st Round	68 th Round	61 st Round	68 th Round	61 st Round	68 th Round
Northern	743	1700	1216	2770	893.6	2053
Central	516.6	1063	894.2	1922	593.2	1256
Eastern	483.8	1017	1007	2095	569.6	1207
North Eastern	599.4	1133	1113	2084	660.4	1270
Western	617.7	1447	1222	2789	849.2	2038
Southern	658.8	1650	1159	2684	809.5	2025
Total	579.2	1287	1105	2477	712.2	1627

Source: Author's estimate based on 61st and 68th round of NSS data.

The study estimates household MPCE among the NSS regions for both 61st and 68th round separately. Table 9 reveals that in 61st round lower MPCE is found in the states of Eastern region with ₹569.6, Central region is ₹593.2 and North Eastern is ₹660.4 and higher MPCE of the households is found in Northern region which is ₹893.6, Western region is ₹849.2 and Southern region is ₹809.5. Meanwhile, in 68th round the MPCE increased in all regions. Whereas, lower MPCE is found in Eastern region with ₹1207, Central region is of ₹1256 and North Eastern is ₹1256.

The study also estimates household level MPCE across socio-religious groups among the regions shown in table 10. The table 10 highlights the,

significant distribution of MPCE among the socio-religious groups for both 61st and 68th rounds. In 61st round, all the socio-religious groups are found to have lower MPCE and in 68th round, the mean consumption expenditure increased significantly.

Table 10: Region-wise Consumption Expenditure across Socio-Religious Groups

NSS Regions	ST		SC		OBC		OTHERS		Hindu		Muslim	
	61 st	68 th	61 st	68 th	61 st	68 th	61 st	68 th	61 st	68 th	61 st	68 th
Northern	547.9	1308	669.1	1584	743.1	1761	1219	2754	873.4	2049	782.5	1596
Central	405.5	905.6	482.4	995.8	558.2	1151	833.8	1948	591.6	1257	567.6	1154
Eastern	397.8	839	486.2	1043	492	1056	752.6	1589	584.8	1237	500.4	1070
North Eastern	710.4	1373	572.9	1296	653.2	1216	650.7	1219	669.4	1280	547.5	1043
Western	536.5	1210	681.4	1720	717.2	1802	1097	2616	842.1	2012	806.6	2041
Southern	495.2	1456	578.6	1596	791.9	1984	1084	2700	780.4	1988	832.7	1974
Total	487.5	1109	554.5	1291	650	1513	958.4	2202	704.9	1623	635.1	1408

Source: Author's estimate based on 61st and 68th round of NSS data.

Figure 3: MPCE of 61st and 68th Round

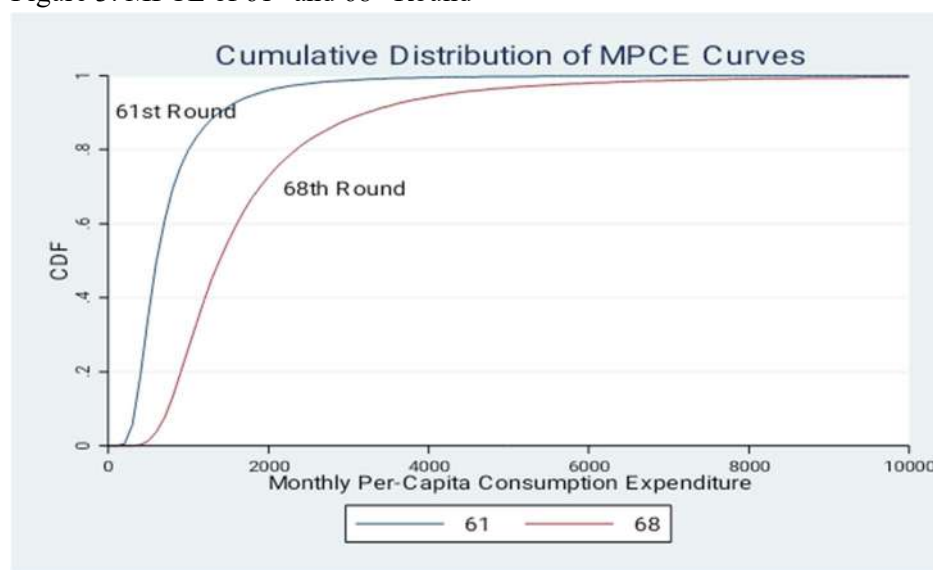
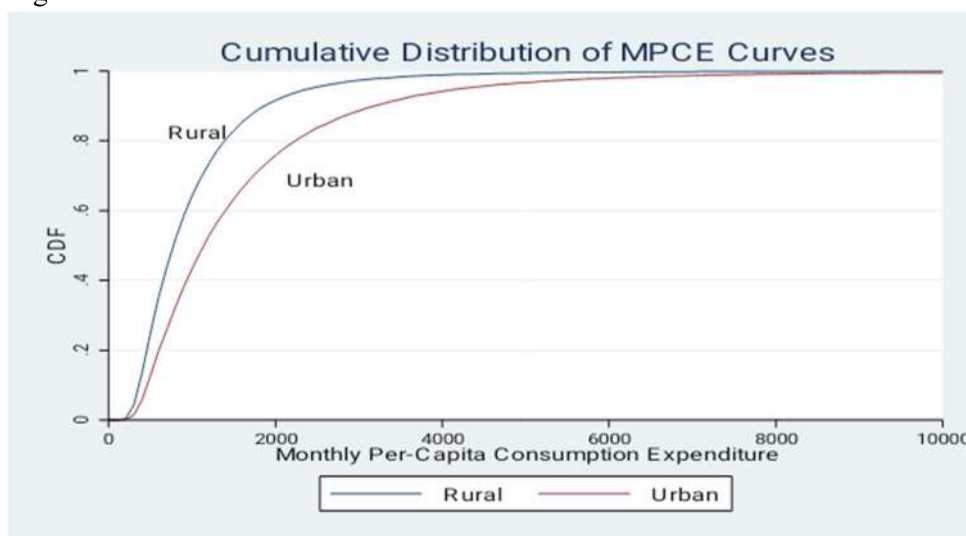


Figure 4: MPCE of Rural and Urban Sector



In addition, the study measures cumulative distribution of Monthly Per-Capita Consumption Expenditure (MPCE) across the classes to estimate the consumption inequality. Figure 3 and 4 compares the cumulative distribution functions (CDFs) of MPCE for the 61st (2004-2005) and 68th (2011-2012) round for both rural and urban sectors. It is apparent that the 61st round has higher MPCE compared to the 68th round and the rural sector has higher MPCE compared to the urban sector, in both the 61st and 68th round of the consumption expenditure.

Figure 5: MPCE of Social Groups

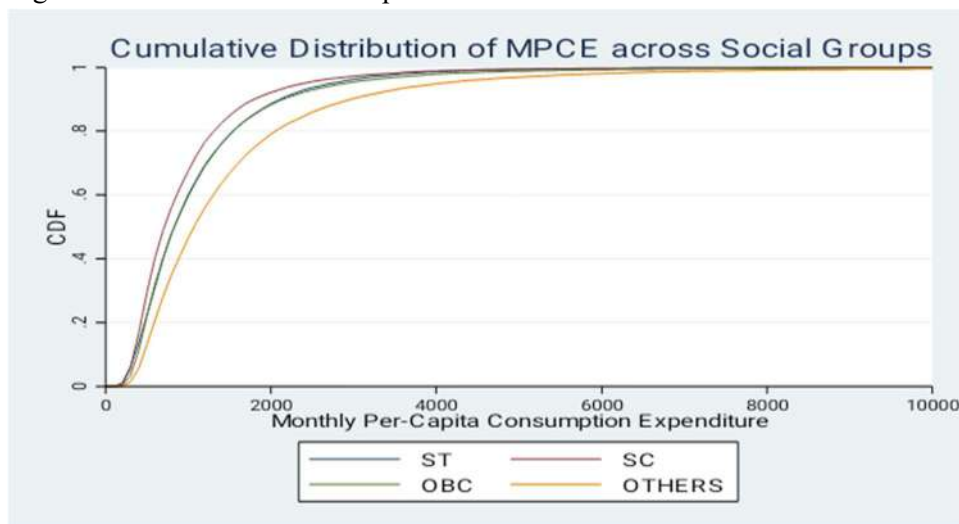
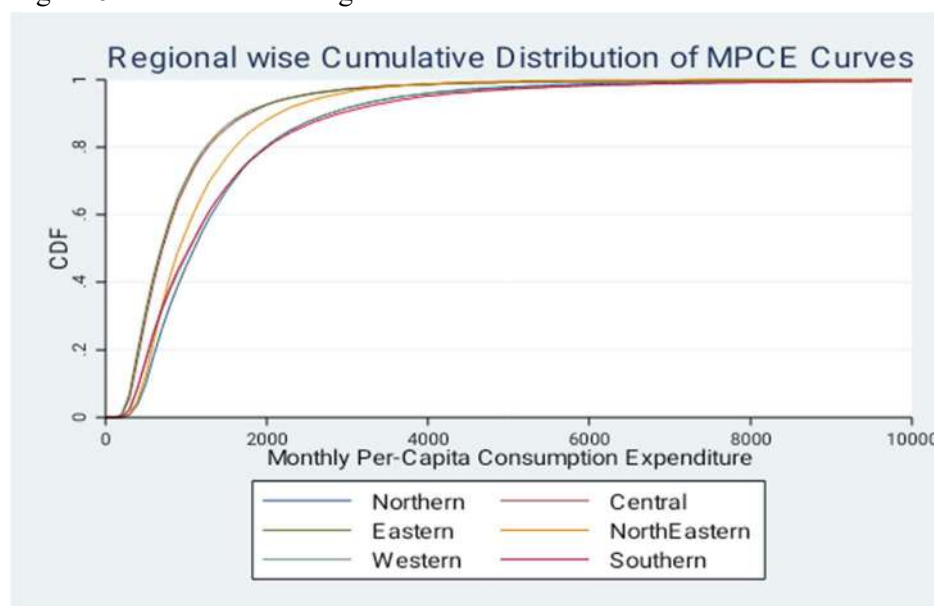


Figure 6: MPCE of NSS Region Wise



Meanwhile, Figure 5 exhibits cumulative consumption distribution function across social groups. It is noticed that there is a larger monthly per capita consumption by SC, ST and Other Backward Class (OBC) in the early stages and thereafter a deviation can be noticed across the social groups. Figure 6, exhibits cumulative consumption distribution function across NSS regions of India; it is observed that there is higher monthly per capita consumption in Northern and Central regions followed by North Eastern, Eastern, Western and Southern regions.

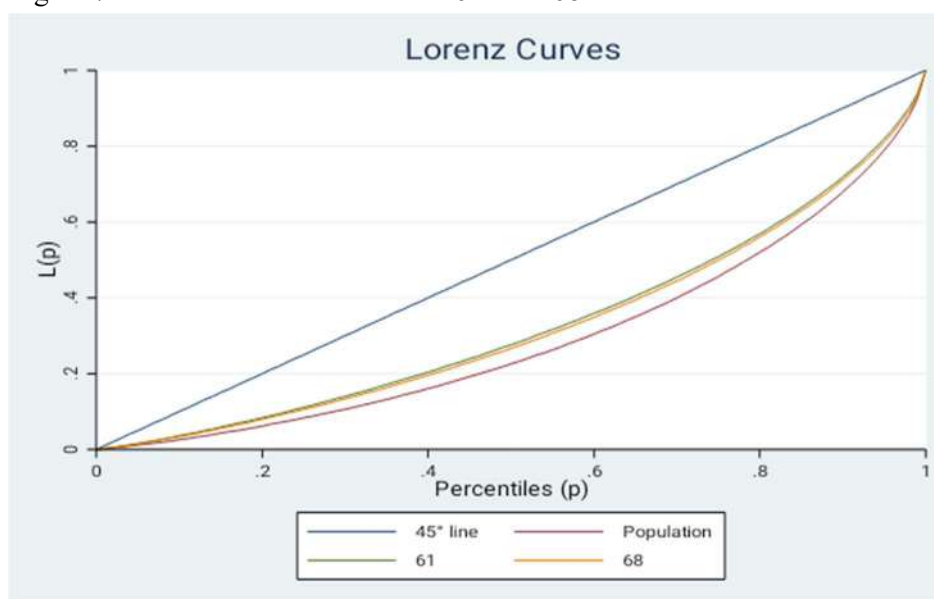
VIII Inequality in Household Consumption Expenditure

The following tables and figures exhibit the inequality measured through Gini index and Lorenz Curve of Monthly Per Capita Consumption Expenditure of 61st and 68th round, for both rural and urban sector. Table 11 shows inequality values, the results reveal that there is no significant difference between in MPCE between the rounds but they deviate towards the end. The Gini value of 61st round is 0.340 and the Gini value of 68th round is 0.355 but they deviate at the end. Whereas, in case of the Lorenz curve of MPCE of both 61st (2004-2005) and 68th (2011-2012) rounds; it reveals that in 61st round, Lorenz curve is closer to the 45° line, the line of equality, and that the 68th round signifies lesser inequality in MPCE (Figure 7).

Table 11: GINI Index for MPCE61st and 68th Round

Round	EST	STE	LB	UB
61 st Round(2004-05)	0.340	0.001	0.339	0.342
68 th Round(2011-12)	0.355	0.001	0.352	0.357
Population	0.414	0.001	0.412	0.416

Source: Author's estimate based on 61st and 68th round of NSS data. Note: EST-Estimate Value, STE-Standard Error, LB-Lower Bond and UB-Upper Bond.

Figure 7: Lorenz Curve for MPCE of 61st and 68th Round

The Lorenz curve has been used for several decades, being the most popular graphical tool for visualizing and comparing income inequality and it provides complete information on the whole distribution of incomes relative to the mean (Doclos Jean-Yves and Araar Abdelkrim 2009).

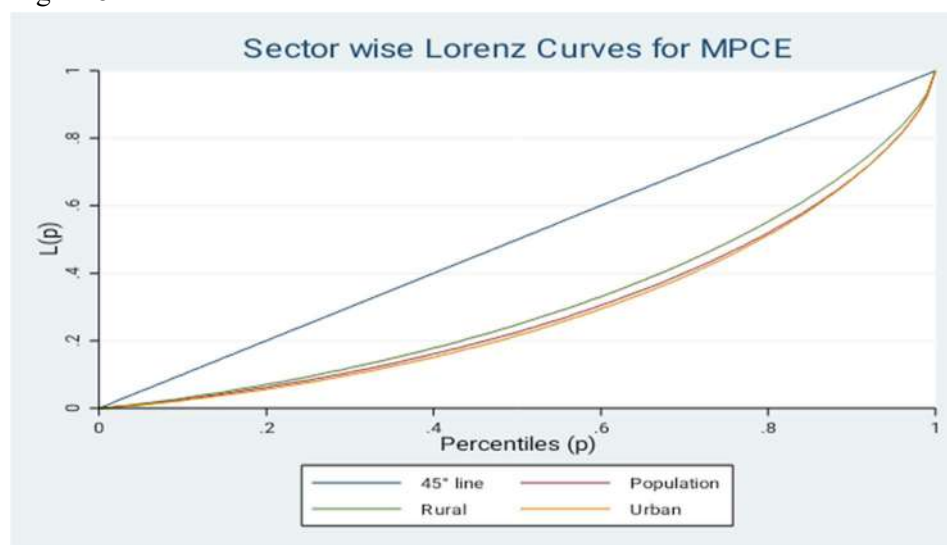
Table 12: GINI Index for MPCE Rural and Urban Sector

Round	Sector	EST	STE	LB	UB
61 st (2004-05)	Rural	0.295	0.001	0.292	0.297
	Urban	0.366	0.001	0.364	0.369
	Popu	0.340	0.001	0.339	0.342
68 th (2011-12)	Rural	0.308	0.002	0.304	0.311
	Urban	0.373	0.002	0.369	0.377
	Popu	0.355	0.001	0.352	0.357

Notes: EST-Estimate Value, STE-Standard Error, LB-Lower Bond, UB-Upper Bond and Popu-Population.

Source: Author's estimate based on 61st and 68th round of NSS data.

Figure 8: Lorenz Curve for MPCE of Rural and Urban Sector



The Gini index value indicates a significant deviation between the rural and urban sector MPCE. The table 12 expresses a lesser inequality of consumption distribution for both 61st and 68th round. In 61st round, the Gini value for rural sector is 0.295 and urban sector is 0.366. Whereas, in 68th round the Gini value indicates larger inequality in consumption distribution with gini value of 0.308 for rural sector and 0.355 for urban sector, the Lorenz curve also reveals, the rural sector Lorenz curve is closer to the 45° line, the line of equality, and the urban sector signifies lesser inequality in MPCE (Figure 8) for both 61st and 68th rounds.

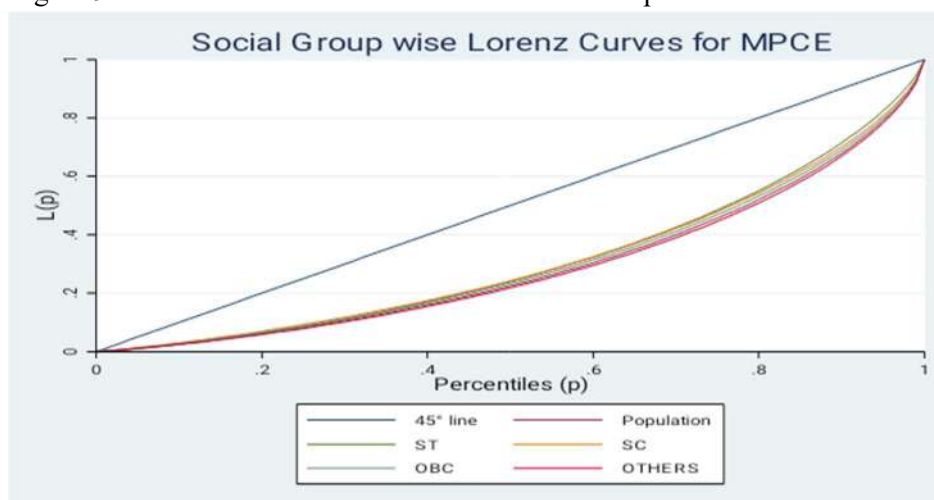
Table 13: GINI Index for MPCE of across Social Groups

Round	Social Groups	EST	STE	LB	UB
61 st Round	ST	0.325	0.002	0.321	0.329
	SC	0.287	0.002	0.283	0.291
	OBC	0.309	0.002	0.306	0.312
	OTH	0.357	0.002	0.354	0.361
	Popu	0.340	0.001	0.339	0.342
68 th Round	ST	0.319	0.002	0.314	0.324
	SC	0.317	0.004	0.310	0.324
	OBC	0.333	0.002	0.329	0.337
	OTH	0.373	0.002	0.368	0.377
	Popu	0.355	0.001	0.352	0.357

Note: EST-Estimate Value, STE-Standard Error, LB-Lower Bond, UB-Upper Bond and Popu-Population.

Source: Author's estimate based on 61st and 68th round of NSS data.

Figure 9: Lorenz Curve for MPCE across Social Groups



The inequality index of MPCE across social groups is shown in above table 13, that exhibits significant inequality in household consumption expenditure in both 61st and 68th rounds for scheduled tribes (ST), scheduled cast (SC), other backward castes (OBC) and others in the country. In 61st round, the consumption inequality is larger among the others with Gini index value of 0.357 followed by ST with Gini value 0.325, OBC with Gini value 0.309 and SC is lower with Gini value 0.287. Whereas, in 68th round, higher consumption inequality is found in others households with Gini value 0.373 followed by OBC with Gini value 0.333, ST with Gini value 0.319 and lastly SC with a Gini value of 0.317. Meanwhile, Figure 9 reveals Lorenz curve across social groups where for scheduled tribes it is closer to the 45° line and the rest of respective caste (SC, OBC and Others) signifies lesser inequality in MPCE for both 61st and 68th rounds.

The study also estimates Gini Index among the religious groups in the country. Table 14 shows that, in 61st round, larger consumption inequality is found in Hindu households with Gini value of 0.342 and Muslim households have lower inequality with a Gini value of 0.306.

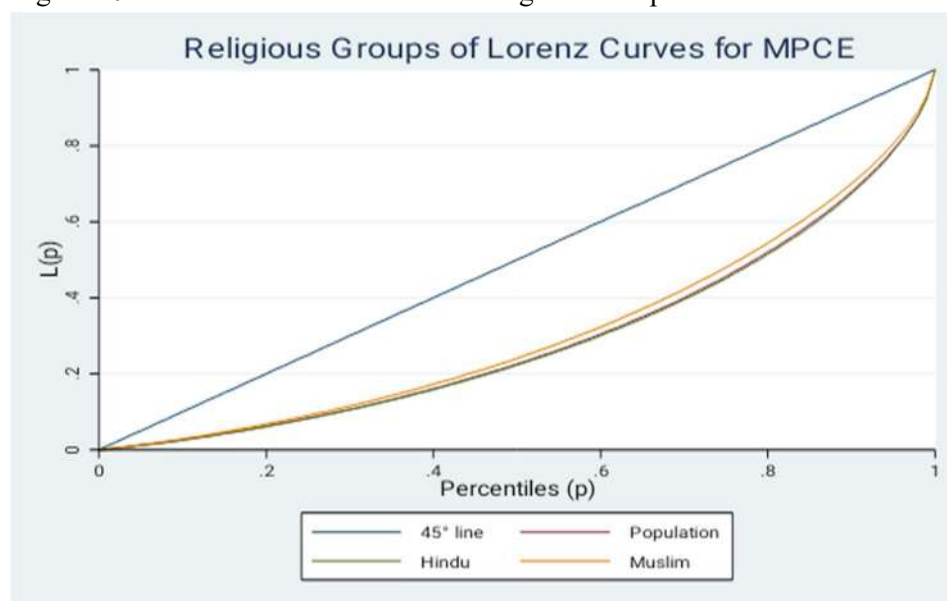
Table 14: GINI Index for MPCE of Religious Groups

Round	Religious Groups	EST	STE	LB	UB
61 st Round	Hindu	0.342	0.001	0.339	0.344
	Muslim	0.306	0.003	0.301	0.312
	Popu	0.340	0.001	0.339	0.342
68 th Round	Hindu	0.360	0.002	0.357	0.363
	Muslim	0.320	0.003	0.313	0.326
	Popu	0.355	0.001	0.352	0.357

Notes: EST-Estimate Value, STE-Standard Error, LB-Lower Bond, UB-Upper Bond and Popu-Population.

Source: Author's estimate based on 61st and 68th round of NSS data.

Figure 10: Lorenz Curve for MPCE of Religious Groups



Meanwhile, in 68th round, higher consumption inequality is found again in Hindu households with Gini value of 0.360 as compared to Muslim households with Gini value of 0.320. Meanwhile, Figure 10 also reveals that among religious groups, the Lorenz curve of Muslims households closer to the 45° line.

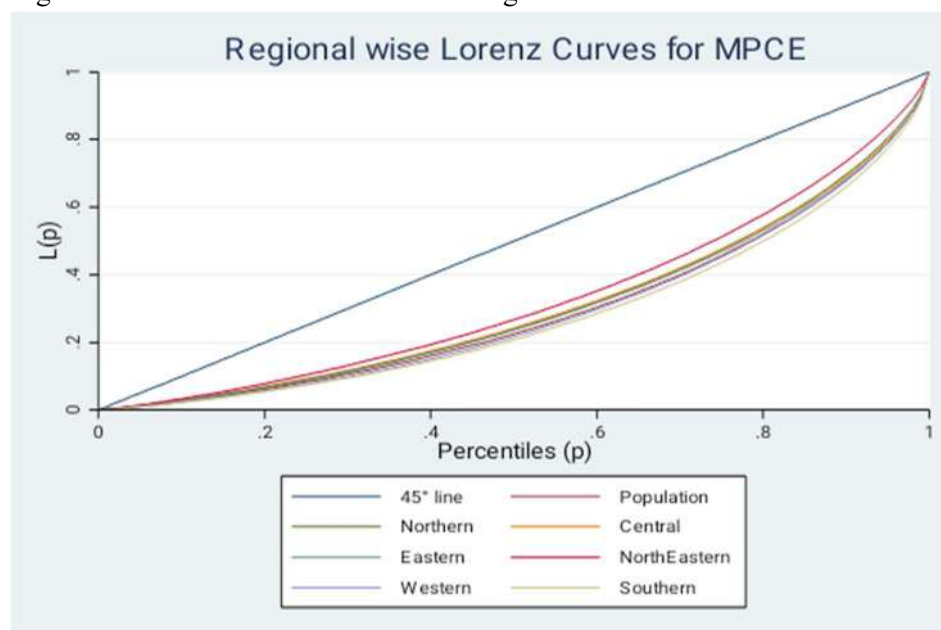
Table 15: GINI Index for MPCE at Regional Level

Round	NSS Region	EST	STE	LB	UB
61 st Round	Northern	0.317	0.002	0.312	0.322
	Central	0.310	0.002	0.305	0.314
	Eastern	0.314	0.002	0.310	0.318
	North East	0.273	0.002	0.270	0.277
	Western	0.370	0.003	0.365	0.375
	Southern	0.368	0.002	0.363	0.372
	Popu	0.340	0.001	0.339	0.342
68 th Round	Northern	0.327	0.003	0.322	0.333
	Central	0.337	0.003	0.330	0.343
	Eastern	0.342	0.003	0.335	0.348
	North East	0.285	0.002	0.281	0.289
	Western	0.348	0.004	0.341	0.355
	Southern	0.367	0.003	0.361	0.373
	Popu	0.355	0.001	0.352	0.357

Note: EST-Estimate Value, STE-Standard Error, LB-Lower Bond, UB-Upper Bond and Popu-Population.

Source: Author's estimate based on 61st and 68th round of NSS data.

Figure 11: Lorenz Curve for MPCE of Region-wise



The study examined the extent of intensity of MPCE inequality across NSS regions in the country (above Table 15). The country has six NSS regions (classified by NSSO), in 61st round. Among the six regions, the Western region consists of five states, that were found higher inequality in MPCE (0.370) which is above the country average with a Gini value of 0.340, followed by Southern region with a Gini value of 0.368, Northern region with a Gini value of 0.317, Eastern region with a Gini value of 0.314 and Central region with a Gini value of 0.310; their regions are below the country average in-terms of MPCE. There is no significant difference between Eastern and Central regions and lastly North Eastern region has a lower household consumption inequality in the country, with a Gini value of 0.273 for both rural and urban sector. Meanwhile, in 68th round, a larger consumption inequality is found in Southern region, with a Gini value of 0.367, followed by Western region with a Gini value of 0.348, Eastern region states with Gini value of 0.342, Central region with Gini value of 0.337 and Northern region with Gini value of 0.327. However, the inequality in North Eastern region states is lower with a Gini value of 0.285 respectively. Meanwhile, the movements of Gini values are exhibits in Lorenz curves, which shows 61st and 68th rounds of consumption expenditure among the NSS regions in Figure 11. Among the regions, that figure exhibits where Northern region Lorenz curve is closer to the 45° line compared to the rest of the regions.

IX Conclusion and Policy Implications

Poverty is one of the most serious issues being faced by any country. It is measured in terms of a specified normative poverty line, reflecting the minimum living standard of people. The current study estimates the regional level of household poverty and inequality in India.

The results reveal that the incidence of household poverty is higher with 38.27 per cent and lower MPCE with ₹712.19 in 61st (2004-2005) round and lower levels of poverty with 22.75 per cent and higher MPCE ₹1104.60 is found in 68th (2011-2012) round. Meanwhile, among the socio-religious groups, higher levels of household poverty are found among the Scheduled Tribes and Scheduled Caste which are larger than OBC and Others and also Muslim households are comparatively poorer than Hindus between the rounds but they deviate towards the end.

Finally, this study identified the factor responsible for pathways out and in, among socio-religious groups household or associated with poverty and consumption expenditure status. A logistic regression model is estimated with an extensive range of household characteristics to discover the determinants of household poverty. The results show lack of household education, occupation and low levels of landholdings as the major determinants of poverty. The probability of being poor decreased with a lower household size and higher land holdings.

Despite various policies to alleviate poverty, malnourishment, illiteracy, hunger and lack of basic amenities continue to be a common feature in some of the regions and social groups in the Country. The policy implementations should focus on development of educational infrastructure and self-employment programs in general; amongst rural households, with special emphasis on Scheduled Caste and Scheduled Tribe (ST) in the region. To contain spatial variation in poverty and inequality, the study suggests the improving of infrastructure in agricultural sector, which in turn increases income generation in the poverty-affiliated regions.

Endnotes

1. <https://www.worldbank.org/en/topic/poverty/overview>
2. Northern, Central, Eastern, North-Eastern, Western and Southern Regions.
3. 65-year old Planning Commission has been dissolved and a new institution name NITI (National Institution for Transforming India) Aayog has been constituted by the National Democratic Alliance (NDA) government in 1st January 2015.
4. Rangarajan Committee (2012), Methodology for Estimation of Poverty, Planning Commission, Government of India Report http://planningcommission.nic.in/reports/genrep/pov_rep0707.pdf
5. Northern Region consists of 7 States, i.e., Jammu & Kashmir, Himachal Pradesh, Punjab, Chandigarh, Haryana, Delhi and Rajasthan.
6. Central Region consists of 4 States, i.e., Uttarakhand, Uttar Pradesh, Chhattisgarh and Madhya Pradesh.

7. Eastern Region consists of 4 States, i.e., Bihar, West Bengal, Jharkhand and Orissa.
8. North Eastern Region consists of 8 States, i.e., Sikkim, Arunachal Pradesh, Nagaland, Manipur, Mizoram, Tripura, Meghalaya and Assam.
9. Western Region consists of 5 States, i.e., Gujarat, Daman & Diu, Dadra & Nagar Haveli, Maharashtra and Goa.
10. Southern Region consists of 7 States, i.e., Andhra Pradesh, Karnataka, Lakshadweep, Kerala, Tamil Nadu, Pondicherry and Andaman & Nicobar Island.
11. The Uniform Recall Period (URP) refers to consumption expenditure data collected using the 30-day Recall or reference Period. The Mixed Recall Period (MRP) refers to consumption expenditure data collected using the one-year Recall Period for five non-food items (i.e., clothing, footwear, durable goods, education, and institutional medical expenses) and 30-day Recall Period for all the rest of the items purchased. The Modified Mixed Reference Period (MMRP) refers to consumption expenditure data collected using the 7-day Recall Period for edible oils, eggs, fish and meat, vegetables, fruits, spices, beverages, refreshments, processed food, pans, tobacco, and intoxicants, and for all other items, the reference Periods used are the same as in the case of the MRP
12. http://planningcommission.nic.in/reports/genrep/pov_rep0707.pdf
13. A binary logistic regression model is considered the most appropriate model for the econometric analysis when dependent variable is dichotomous (binary) variable such as incidence of poverty in our case. It fits well for both continuous as well as categorical independent variables.

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Discovering Boundaries, Building Dialogues: Historical Sociology, Economics, and the Evolution of the Dominant Caste in Western India

Apurva Apurva

The paper challenges mainstream economists' ideas that economic growth and productivity in the neoliberal framework can reduce inequality and alleviate poverty. Using the lens of historical sociology, it demonstrates that at the present conjuncture, belonging to a dominant caste of a region may not necessarily yield economic benefits. In fact, economic chasm and differentiation within a caste group appear to have widened. Only those groups within the dominant caste have achieved upward class mobility whose land happened to crisscross neoliberal agendas of urban zoning and spacing. To build an interdisciplinary dialogue, this paper invites economists to observe a complicated and contradictory picture full of unresolved caste and class predicaments as economic liberalization unfolds in India.

Key Words: Dominant caste, Class-in-caste, Capitalist transition, Urbanization, Neoliberalization, Economic sociology, Political economy, Interdisciplinary dialogue

Introduction

This paper uses the lens of historical sociology to examine the social formation and economic differentiation within a dominant agricultural caste—Maratha Kunbi—in Western Maharashtra in the successive transition period from colonial to post-independent to neoliberal economic expansion. It argues that relative economic prosperity and political supremacy of the dominant caste cluster of the region are outcomes of the twin processes of capital accumulation and political accommodation. It further demonstrates that while social and economic hierarchy always existed, neoliberal economic processes in the region have weakened the hold of the dominant caste structure and widened the class differentiation within the caste cluster.

In light of the argument, reassessing the debate on transitioning from feudalism to capitalism is useful. The transition narrative from feudalism to

Apurva Apurva, Visiting Lecturer, Department of Sociology, SUNY Oneonta, NY 13820,
Email: apurvaa@oneonta.edu

I thank Sujata Patel for encouraging me to write this paper. She had read multiple drafts of it, and her insightful comments and suggestions helped clarify and articulate the theme and argument of the paper.

capitalism in the West takes two diametrically opposite forms. Brenner (1977) argued the development of capitalism and its future in terms of the presence (or absence) of modern productive forces, the emergence of new class relations, and the specificity of class conflicts. Brenner's emphasis on internal factors responsible for capitalist development in Western Europe came in response to Frank (1969), Wallerstein (1974 and 1979), and Amin's (1976) arguments that relied on external factors. They all claimed, in one way or another, that the development of capitalism in colonial countries (the core) produced underdevelopment in the colonized economy (the periphery) through unequal trade relations and the transfer of surplus value from the periphery to the center.

Deliberating on the transition question, Thorner (1982) assembled the views of scholars, including economists, to determine whether India is a semi-feudal or capitalist country. In this debate, scholars concurred that colonialism led to a distorted capitalist development, and semi-feudal relations of production still existed in some parts of India (Bhaduri 1973, Prasad 1974, Chandra 1974). However, they overwhelmingly agreed that in the post-independence era, capitalist tendencies – use of agricultural machinery, appropriation of surplus from wage labor, reinvestment of profit for further accumulation – dominated Indian agriculture (Patnaik 1976). While the debate settled some of the issues, such as the preference for the term non-capitalists (Patnaik 1971) over 'pre-capitalist' and rejection of a 'dual mode' of the economy, it is compelling to notice the conspicuous absence of the social category of 'caste' in the transition debate in India.

In contrast, the discussion about India's political-economic development remained short shrift in early sociological discourse. Sociologists, particularly social anthropologists, were preoccupied with studying inter-caste and kinship relations and the adaptability of caste ranking in villages and towns without necessarily participating in a more extensive debate about the economic transition and emerging classes within caste categories. For example, M.N. Srinivas introduced the concept of 'dominant caste' in the 1950s without discussing the class composition of Indian society. He defined the dominant caste in terms of high numerical strength and ritual status, large landholding, and a group keen on adopting a western lifestyle, non-agrarian occupations, and modern education (Srinivas 1987). Later, Bêteille (2007) and other sociologists noticed the omission of 'class' in sociological literature. Consequently, they incorporated the necessary language of 'material forces of production' in explaining the class formation and the evolution of capital-labor relations in India's industrial center (Patel 1987).

In the post-independent period, Bardhan (1984 [1998]), an economist by profession, examined the caste and class relationship to describe the nature of the Indian state and the constraints on the country's economic growth. He demonstrated how the state accommodated 'dominant proprietary classes' through 'patronage' and 'subsidies,' which bolstered the economic position of dominant classes and castes in India. However, Bardhan's analysis neglects the discussion

about social formation, economic differentiation, and schism within a regional caste group in India's social and economic transition.

Since the 1980s, India's march towards capitalist development has continued, albeit in altered political and economic conditions. First, neoliberal capitalism has enabled the new condition; however, its characteristics and mode of operations are different from the Global North. In the North, neoliberalism is tantamount to the withdrawal of the 'welfare' state and the promotion of the free market in allocating goods and services for economic and social development (Harvey 2005, Stiglitz 2002). Such conceptualization hinders the understanding of neoliberal conditions in the South.¹ For example, in India, the state introduced neoliberal reform by 'stealth' (Jenkins 1999) and played an active role in the economy by following a 'pro-business' approach to economic development (Kohli 2012). Second, instead of an agrarian model of development, a dominant form after India's independence, the current mode of capital accumulation hinges on the commodification of urban land in the forms of Special Economic Zones (Kennedy 2014, Levien 2018), construction of urban infrastructure and corridors (Anand and Sami 2016, Balakrishnan 2019) real estate development and speculation (Goldman 2011, Searle 2016) and the development of the tertiary sector of the economy such as Information Technology and Information Technology Enabled Services (Upadhyaya 2016).

Is the new mode of capitalist development good for Indian society? The mainstream economists believe it is and affirm a two-fold strategy for India's rapid economic and social development: first, accelerate economic growth through liberal labor laws, incentivize private players through economic concession, build modern urban infrastructure, and create global investment opportunities, and two, redistribute the fruits of growth to alleviate poverty and forge an "inclusive" society, that is, a better economic and social future for all Indian citizens (Panagariya 2008, Bhagwati and Panagariya 2012).

This article challenges the ideas of mainstream economists and the Indian avatar of "trickle-down economics." It shows that such economic wisdom is ahistorical because it fails to recognize the enormous chasm between the two steps: a) accelerated economic growth and b) the redistribution of resources. The paper formulates arguments against mainstream economics by building on Bardhan's political-economic analysis, but for a neoliberal India. It presents historical evidence that reveals consistent political and economic accommodation of the powerful rural elites who, in turn, have used the conditions for economic diversification, capital accumulation, and consolidation of their position in society. One of the paper's main findings is that at the present conjuncture of neoliberalization and urbanization, being a dominant caste of a region may not necessarily yield economic benefits, as evident in the case of Maratha-Kunbis, in Western Maharashtra. In fact, only those subgroups, such as Magars, within the dominant caste have achieved upward class mobility and bourgeoisification of their lifestyle, whose land happened to crisscross neoliberal agendas of urban zoning and spacing in the Pune region. Moreover, the condition galvanized other

groups within the Maratha community left behind by the neoliberal development process to demand reservations in education and jobs in Maharashtra.

Methodology

The paper focuses on the case study of Magarpatta City in the context of changing economic, political, and social structure of Western Maharashtra. It begins by asking how and why a farming community, Magars, was able to build a real estate development in the shape of Magarpatta City. The broader research examined Pune's peripheral urban development, where agricultural lands were converted into SEZs, Integrated Townships, or a combination of both in the early 2000s. To find an answer to the question, I conducted structured and unstructured interviews with various actors: The Magar leadership and the other landholders, real estate developers, planners and architects, and real estate journalists of Pune. Most interviews were conducted in 2006-2007 and a few others later in 2014-2015 when my research focus moved to the western peripheral development of Pune at Hinjewadi. This 'bottom-up' approach to studying neoliberal urban transformation is complemented by the historical sociological method that examines the structure and processes of the Western Maharashtra spanning from the colonial to post-independent to the liberalization period. The method of historical sociology reveals how political and economic processes over the time limit or enable choices for social groups, Maratha-Kunbi in general and Magars in particular, leading to intended as well as unintended outcomes in the capital accumulation process and caste-class relations.

The article is divided into three sections: The first part contextualizes the Maratha caste cluster under neoliberal economic development. It focuses on the rise of the landowning Magar community at the periphery of Pune city and demonstrates a contradictory development within the community. On the one hand, the paper observes the ascendancy of the Magars' class position and economic diversification of elite Marathas; on the other, one notices the demand for reservations for the other community members who once exercised their caste hegemony in the region. Parts two and three historicize the formation of the dominant Maratha community in the post-independent and colonial era. In the post-independent period, the Maratha hegemony rode on the Congress party's plan of political accommodation, bringing together the political elite and the Maratha-Kunbi caste cluster. But, the dominance of the Maratha caste cluster, a significant regional social development in India's transition to capitalism, has its root in colonial Deccan agrarian policies. The British rule introduced a new land revenue model, promoted the commercialization of agriculture, and built canals to cultivate sugarcane crops.

I Neoliberalization and the 'Urban Turn'

Beginning in the 1980s, the Indian state recalibrated its developmental role and redefined the vision for the human betterment of its people. Since the past decades' restrained industrial growth and agricultural reforms yielded economic crises, a service-oriented economy, and urban-infrastructural development became the torch bearer for a new 'shining India.' In the framework of liberalization and privatization, the state started promoting Special Economic Zones (SEZs) and Information Technology (IT) parks. In addition, it extended an invitation to global financial investments, legislated new laws that commodified the land market, facilitated private real estate development, and encouraged wild speculation on land, housing, and other infrastructural development projects. With this, India entered a new regime of accumulation based on an accelerated urban transformation, although it remained confined to specific regions and cities. The overall rate of urbanization is still slow, but one notices an ascendancy of peri-urban development as well as greenfield projects all over India (Kennedy and Sood, 2016), such as Electronic City – Bengaluru (Karnataka), Amaravati (Andhra Pradesh), Dholera (Gujarat), Gurugram (Haryana), Greater Noida (Uttar Pradesh), New Town-Rajarhat – Kolkata (West Bengal) and Hinjewadi and Magarpatta City – Pune (Maharashtra).

Urban projects, such as building SEZ and IT parks, required land acquisition. After independence, the developmental state acquired land for public-sector infrastructure projects and was able to dispossess landowners and workers without facing much opposition. The owners agreed to give up their land rights as they perceived this as a service to the nation and an unavoidable condition for India's economic growth. In comparison, since the 2000s, farmers from all parts of India have vehemently opposed land acquisition for the SEZ and other urban-industrial projects. The anti-dispossession movements have successfully halted many multi-million-dollar SEZ projects in Goa, Haryana, Odisha, and West Bengal (Jenkins, Kennedy, and Mukhopadhyay 2014). The defiant farmers have been holding up against the land acquisition because they have observed how their land is used for speculation, upscale gated residences, private-commercial, and corporate development. On the one side of the story are small farmers and agricultural laborers facing forced eviction and showing resistance — dispossession and anti-dispossession movements. In this vein, Levien (2018) examines dispossession as a means of accumulation. On the other side of the story are the landed elites, who have used their caste-class privilege to gain a better deal in the redistribution of resources in the growing urban market. For example, ushering into the era of economic liberalization, many affluent Marathas undertook new business opportunities, particularly investments in wineries, education, and real estate (Damodaran 2008).

Marathas under Economic Liberalization: Exploring the Urban Market

In the new economic context, the economically powerful Marathas started participating in the broader capitalist market. This participation was simultaneously mediated by changing political alliances and a partial decline of Maratha hegemony in Maharashtra (Deshpande and Palshikar 1999). Yet, elite Maratha entrepreneurship remained on the rise. With the opening of the market, Western Maharashtra's rural elites adopted commercial and cash-rich agro-activities (floriculture, horticulture, and viticulture). For example, a Maratha entrepreneur Shamrao Chougule founded Maharashtra's first winery at Narayangaon on the Pune-Nasik road, which now produces wine and champagne for the global market. The other two Maratha business moguls in wineries are Rajeev Samant, who supplies from Sula Vineyards, and the Pune-based realtor (earlier an irrigation contractor) Avinash Bhonsle (Damodaran 2008). Still, others ventured into the leisure industry and private educational institutions establishing medical, engineering, management, and polytechnic schools. In a few cases, elite Marathas simultaneously owned educational institutions and held ministerial positions in the state education department (Damodaran 2008, pp. 239-40).

Landed Elites and Peri-Urban Development in Pune

The agrarian landowners, the Magars, at the edge of Pune, have been part of neoliberal urban expansion since the late 1990s. They have responded favorably to the commodification and privatization of land development and have benefitted the most from the peripheral urbanization of Pune. The implementation of neoliberal policies brought unique economic opportunities not available earlier to this group who belonged to the Maratha caste cluster.

Making the neoliberal space—decorated with SEZs, gated communities, and IT parks—like the one in Magarpatta City, Pune, requires the acquisition of common and fertile agricultural lands. For liberal scholars, particularly economists, land acquisition for urban and infrastructural projects is a necessary step to transcend the tag of India as an "emerging" or "developing" economy. But the landed farmers whose land is at stake may not share the same enthusiasm. Land dispossession has become one of the highly contentious issues in contemporary India. One observes a fierce opposition to the appropriation of land in which the state transfers the acquired land to private corporations. In past decades, accounts of anti-SEZ movements have been found in West Bengal, Odisha, Haryana, and Goa, where militant farmers have successfully opposed or stalled developmental projects (Sampat 2015, Levien 2018). Even in Maharashtra, the Maharashtra Industrial Development Corporation (MIDC) led SEZs development has faced opposition (Kale 2008). But the emergence of the state-supported land cooperatives (Balakrishnan 2019) and the desires of the landed elite to leave behind the "low-status" agricultural work explain new economic trajectories

appropriated by the agrarian bourgeoisie in the context of neoliberal urban expansion.²

The case study of Magarpatta City, a much sought-after sub-urban terrain filled with high rises and service sector industries, shows that caste is a significant axis through which structures of accommodation and accumulation play out in peripheral urban development in Pune. Dominated by the Maratha caste cluster, the urban expansion in the Magarpatta area allowed the elite strata of the group to reproduce its dominant status, unlocking new avenues for capital accumulation.

From Farmers to a Business Class: Magars of Magarpatta City

In 1997, a delegation from Pune's chapter of the Maharashtra Chamber of Commerce, Industries, and Agriculture (MCCIA) went to San Jose, California. The group primarily consisted of representatives from the IT sector of Maharashtra, but it also had members with varied business interests. One of the members was Satish Magar, an agricultural graduate from the local farming community who wished to become a real estate entrepreneur. After arriving in San Jose, he visited the local urban planning department, met experts, took notes on the city's spatial organization, and returned with one unique concept: "walk to work." Later, he would visit cities in Malaysia and Singapore to find a similar and ubiquitous pattern of "corporate-cum-residential" urban settings. Satish Magar noticed this emerging global trend of the urban spatial organization and tried to reproduce his newly acquired knowledge on the agricultural land he and other farmers owned for generations outside Pune's city limits. After the initial planning and various government approvals, he built a 430-acre integrated township: Magarpatta City – a "walk to work-home-recreation lifestyle" infused with sports, leisure, shopping, and other facilities.

Until the early 1980s, Magarpatta was an agricultural zone where Magars, the most prominent clan group owning 40 per cent of the land strip (patta), and others cultivated sugarcane and vegetables. Of the Magarpatta community, the Maratha caste cluster constituted more than 90 per cent, and many drew their ancestry from landholding in the area for more than three hundred years. In 1982, Pune's draft development plan declared the Magarpatta area as a future urbanized zone; however, till the next plan was formulated in 1987, the site primarily remained agricultural. In the early 1990s, the central government, as a part of neoliberal reforms, passed the 74th constitutional amendment, which gave local municipalities the power to conceive urban planning under the framework of urban-rural integration. The decentralization of power allowed the Pune Municipal Corporation (PMC) to expand and incorporate twenty-three fringe villages within its boundary. However, the integration of Magarpatta into the city led to increased unauthorized constructions in the area, and farmers began to negotiate or, in some cases, sell their land rights to private real estate developers. In this context of inevitable urbanization and perhaps insecurity over livelihood, the Magar community, the largest landholders in Magarpatta, took a strategic decision in

1993, under the leadership of Satish Magar, to quit farming and embrace real estate development. This deliberate move resulted in the coming together of around 120 families, who combined their land to build Magarpatta City Township (Apurva 2007, Ganguli 2013). In 1995, Maharashtra's Department of Urban Development and the PMC approved the Master Plan of Magarpatta City, and in 2006, Magarpatta acquired the status of the (IT) SEZ.

While the Magarpatta model as a new form of urban spatial organization has evoked a favorable response in the popular press, the scholarly discussion on building Magarpatta City is limited to analyses of power and politics around urban processes in Pune. Sami (2012) emphasizes how Satish Magar was able to mobilize temporary alliances and form "urban coalitions" toward building Magarpatta City. The scholarly accounts term the farmers' role in Pune's urban development process unprecedented. At one level, such analysis provides a useful perspective on contemporary urban actors and political processes in making the urban periphery. However, it lacks historical insights into the long association of big farmers with the urban areas and the continuous investments of rural elites in towns and cities. From the historical perspective, Magar's role in urban development is not unique. Instead, it shows one of the many possible business opportunities for wealthy farmers that was swung open by the logic of neoliberal development. From Sami's perspective, it appears as if the transition of Magarpatta from an agricultural to an urban zone and the transformation of a farming community into a real estate developer needed a few political nudges here and a few schematic alliances there.

This paper shows the transition from farming to real estate development does make sense if we put Magarpatta and the landholding caste of Magars within the evolving regional history of economics and politics dominated by Maratha elites. It is in the context of the regional history of Western Maharashtra, successively shaped by the colonial policies of irrigation, postcolonial politics of sugar cooperatives, and neoliberal imperatives of the urban, that one can begin to understand the ways in which Satish Magar was able to mobilize external political networks and organize finances for Magarpatta City. Of course, internal economic disparity existed within the Magar community since big farmers such as Satish Magar and his family collectively owned around 150 acres of land, and small farmers landholding was limited to an acre or, in some instances, half an acre (Sami 2012). Nevertheless, the economic standing of the Satish Magar – often respectfully referred to as Satish 'dada' by fellow clan members – allowed him to wield power over smaller farmers whose lands were further divided among brothers into smaller plots known as pattas. So, when pattas—narrow strips 20 feet wide and 1000 feet long land—had to be pooled for the real estate development, knowledge of sugar cooperatives, an emblem of the region, laid out a solution to them. The Magars and the others assembled their land to form a farmer's cooperative in which each agreed to receive proportionate shareholdings against the size of their ownership. As a result, the Magarpatta Township Development

and Construction Company (MTDCC), established in 1994, moved from being a farmer's cooperative to a private limited and then to a public company.³

Many popular depictions of Magarpatta City are in awe of Magars, a group of farmers who created a real estate wonder. However, examining the social and cultural capital of Magars, especially their leader Satish Magar, puncture the claims of building a real estate wonder on the farmland by inexperienced farmers. Such claims are only partially valid since Satish Magar's father was an engineer who managed his enterprise in civil construction. Familiarizing with the construction business became convenient for Satish Magar, who presented a plausible land development plan to other kin members. It helped the cause that Magar families were not only the dominant clan and the largest landholder but also had deep familial connections within the state's politics. The close relationship with Sharad Pawar strengthened the development project and secured Satish Magar's ascendancy to entrepreneurship. In many public interviews, the farmer-turned-entrepreneur has boasted that "politics is in my blood" and that his family had close ties with the Congress party for four decades. For example, his mother's father was Pune's first mayor, and his uncle Anna Saheb Magar played an instrumental role in establishing the Pimpri-Chinchwad (a suburb of Pune) Municipal Council in 1970. These prior political links enabled Satish Magar to approach the right people and the right desk in the otherwise highly inaccessible corridors of India's bureaucratic labyrinth. He first approached the renowned architect from Mumbai, Hafeez Contractor, who drew up the preliminary master plan of Magarpatta City. After that, he proposed the plan to the then Chief Minister of Maharashtra, Sharad Pawar, B.G. Deshmukh (a retired Cabinet Secretary), and D. T. Joseph (secretary of the state's urban planning department). All showed a special interest in the project and ensured that various approvals and permissions were met quickly. Moreover, the promotion of Magarpatta City was legitimized in public eyes as a model development that can reduce unauthorized urban growth at the periphery of Pune. Like many other urban development projects of the time, the strategic alliance of the state and real estate portrayed Magarpatta City as yet another neoliberal spatial purifier, a project that was supposed to correct and sanitize the collective irrationalities of post-independence urban planning in India.

If the mobilization of political and administrative networks were part of one wheel that rolled the project, then access to liquid capital and guidance to operate real estate markets propelled the other wheel forward. Both came from Deepak Parekh, then the managing director of the Housing Development Finance Corporation (HDFC). The initial inhibitions of the lenders, regulatory hurdles over bank loans, and a general mistrust to fund farmers' real estate projects gradually yielded to a personal acquaintance and mutual interest that benefitted both the Magarpatta Township Development and Construction Company (MTDCC) and HDFC. Parekh initially offered a loan of ₹2-crore for the construction project, while Satish Magar agreed that the HDFC would have the right to preside over financing home loans to the property buyers in the township.

The former farmers appear to be enjoying their newly acquired status of "entrepreneurs." While still owning land in their name, they claim that the land is their stock and they are now "venture capitalists." However, a closer look tells that some of them have found non-venture sources of income by renting out their spare apartments and other properties. In contrast, some have taken up variegated occupations in urban gardening, food catering, internet, cable TV providers, and the transportation business. To help get a proper transition from a farmer to a businessman, the MTDCC trains farmers and teaches them new practical skills.

The transformation of farming land into urban real estate at the periphery of Pune has caught the eyes of the popular media and liberal intelligentsia. The success of the township has become a widely circulated case study for management schools in India, all of which have since touted Magarpatta City as a national model to be imitated for India's urban development. In the context of the anti-dispossession movement, the central government recommended farmer's cooperatives for developing integrated IT townships in other states. Whether there can be many Magarpattas in India is an irrelevant question partly because such development depends on the size of the landed community, their socio-political influence, and landholding history in the region. What is significant is that India will urbanize with or without the Magarpatta model because of at least two reasons: a) neoliberal urban development puts a high premium and returns on the commodification of land, and b) there is a tacit consensus among farmers at the periphery of a city that urbanization is the way forward. In the case of Magarpatta, what is demonstratively true is how the social and political capital deeply intertwines with the commodification of agricultural land, a phenomenon that can be attributed to the state's pro-business strategy and structural changes brought to the Indian economy since the 1990s. The business-friendly policy, access to finance, and expansion of municipal limits provided new incentives for private real estate development in Pune. While conditions turned out to be beneficial for all real estate developers, it was exceptionally profitable for Satish Magar and his farmer allies because they could mobilize caste networks, make political connections, muster business contacts, forge temporary alliances with other influential actors, and most importantly could use landownership to further capital accumulation in the brewing neoliberal urban economy of Pune.⁴

As this paper shows, the emergence of a new wealthy class, such as Magars, within the Maratha caste cluster is not new, and so is the internal stratification between the Maratha elite and the rest of the community. Still, the neoliberal developmental model has created division and cemented a schism within this caste cluster so that only some clans or groups, particularly those bordering cities, can reproduce their privileged caste and class position. Deshpande and Palshikar (2017) argue the growing division among the Maratha community and demand for reservation is the result of the new political economy that aggressively pushed the agenda of economic liberalization and urban-centric growth model in Maharashtra at the expense of agrarian interest.

The demand for reservations has dented the image of Maratha hegemony, but in what ways was the internal division between the elite and masses addressed before the period of a neoliberal form of economic development? How did Magars, who formed a farmer's cooperative for real estate development, learn the tricks of the trade? The paper looks beyond the neoliberal phase to find the answer.

II The Developmental State and Capitalist Farmers⁵

In contrast to the urban-centric neoliberal development model, the newly independent Indian state visualized agricultural modernization as a way to build a better life for all. It formulated agrarian policies assuming it had to rebuild a new rural order that extractive colonial rule had defiled. In order to reconstruct the rural economy, the state initiated land reforms, promoted a cooperative model of agricultural development, and later introduced the Green Revolution. Yet, the rural development and social change that followed continued to mirror the image of colonial times. The rich peasants (varied regionally but often landowning local dominant castes) remained the beneficiaries of the new reforms even when some legislations appeared pro-poor. The rich peasants continued to invest in agriculture-based industries but also diversified their agricultural surplus in retail and distributorships, contracting and trade, transport business, small-scale industries, and in some cases, even financed film industries and educational institutions. The economic power that rich peasants gained during colonial times was used to mine the inner workings of political power to their advantage in the post-independence period. They aimed either to seize control over the ruling Congress party or through political mobilization and movements against state power. Both strategies, however, accomplished one aim: securing further capital accumulation for the landowning dominant agrarian caste of the region. Various scholarly accounts show that land reforms and the Green Revolution empowered the capitalist farmers in North and South India⁶. But its impact was less consequential for Western India, particularly in Gujarat and Maharashtra. In this region, rural cooperatives emerged as a defining entity having their roots in the region's history and colonial policies.⁷

"Cooperative Capitalists" and the Political Dominance of Marathas

The spread of sugar factories in the canal districts of Western Maharashtra led to the establishment of Cooperative Sugar Factory by influential Maratha peasant leaders—Vithalrao Vikhe-Patil and Ganpatrao Rabhaji Autade—in the early 1950s (Baviskar 1980). Many conditions allowed the expansion of sugar cooperatives from the 1950s onwards. First, economically, it provided a reliable market for cane growers because cooperatives controlled the price of sugar. To extract maximum sucrose from cane to make white sugar, a high volume of steady and timely supply of sugarcane was necessary (a "techno-economic" compulsion to make sugar cooperatives economically viable). Since big Maratha farmers could

not alone produce a high quantity of cane, they struck a partnership with the small and medium cultivators (Damodaran 2008). This alliance had implications for the politics of Maharashtra in the following decades because big farmers had to accommodate the interests of small farmers. Second, socially, such partnerships were possible and convenient in the sugar belt of Western Maharashtra because Maratha-Kunbis constituted 41 per cent of the total population in the region and had established kinship networks within the caste cluster from pre-colonial times. From the 1950s, what changed between the elite Marathas and common Maratha Kunbis was the expansion of the elite's patronage to the Kunbis from the socio-cultural sphere to the political domain. The need for political patronage arose due to profit motives and compulsion to operate the sugar cooperative industry in specific ways. For the elite Marathas of Western Maharashtra, who were soon to become a dominating force in the state's politics, the sugar cooperatives (also *panchayats* and Employment Guarantee Scheme[EGS]) became the instrument through which both (patronage and profit) could be realized after independence.⁸ The last point needs to be politically contextualized and elaborated.

From the mid-1930s, the Congress Party (hitherto dominated by the Bombay bourgeoisie consisting of Gujarati traders and upper caste Maharashtrian *brahmin*) gradually began incorporating the dominant Marathas into its fold because of the rising influence of Marathas in rural Maharashtra. As a result, within a short span (1935-1938), there was a more than seven-fold increase in the Party's rural constituencies (Lele 1990). Congress's support to Marathas continued even in the post-independence period. The state and the central government favorably granted a license to sugar factories that were part of cooperative enterprises. As a result, the sugar cooperatives became a hub for political grooming and Maratha leadership (Baviskar 1980). However, in the early 1950s, a militant Maratha leader, Keshavrao Jedhe, left the Congress party to form the Peasants and Workers Party (PWP) since he realized that the local Congress unit was still under the influence of the bourgeois class and the Maharashtrian *brahmins*. Later, the PWP supported the *Samyukta* (United) movement that demanded a separate Marathi-speaking state of Maharashtra. That demand was met in 1960, and the Congress candidate Yashwantrao Chavan, a Maratha, became the new state's first Chief Minister, who soon strengthened the Party by incorporating the rebel Maratha leaders into the Congress regime. For the next three decades, under the power and influence of three Maratha politicians: Yashwantrao Chavan, Vasantdada Patil, and Sharad Pawar—all Chief Ministers under the Congress party rule—the sugar cooperatives in Western Maharashtra flourished.⁹ To be sure, it was not only Chief ministers but also the other Maratha elites who occupied powerful positions at different levels in rural politics and the state legislature.¹⁰ The democratic setup opened up a political space that allowed Maratha elites to control, accommodate, and manipulate the majority of Maratha Kunbis under the contrived Maratha status "at will and whenever necessary" (Lele 1981, p. 55).

By the late 1970s, the effect of elite Maratha's patronage on cooperatives manifested in the increased sugar production in Maharashtra. The factories

operated as modern industrial units, and membership of each factory ranged from 2,000 to 4,000 cane growers, covered between 50 to 100 surrounding villages, crushed 200,000 to 400,000 tonnes of cane annually, employed around 1000 workers directly and 3000 to 5000 indirectly, and an average factory earned over ₹10-crore annually (Baviskar 1980, p. 6). In the early 1980s, the value of total sugar production produced by sugar cooperatives was almost equivalent to the production value of the iron and steel industry in the state. By the end of the 1980s, the sugar cooperatives of Maharashtra produced nearly a third of total white sugar production from sugarcane in India. Damodaran (2008) estimates that of the total 175 cooperative sugar factories in Maharashtra, the Marathas actively promoted at least 140 of them.

It is also imperative to notice the economic diversification that has taken place along with the growth of sugar cooperatives in Western Maharashtra. The surplus from sugar production often found a way into building distilleries for alcohol production from molasses, chemical plants, paper production, and dairy and poultry farms (Attwood 1992, pp. 225-228). In the neoliberal period, the Magars relied on the Maratha community's past economic experience and accumulated social and political capital to launch themselves as real estate developers.

The following section digs deeper into the transition to capitalism in the western Maharashtra region and asks what led to the formation of a dominant Maratha caste during the colonial period and how this social formation is connected to the building of canals and sugarcane cultivation in Bombay Deccan.

III The Maratha Community in the Colonial Period

Traditionally, Marathas are an agricultural caste in rural Maharashtra. They appear as one homogeneous group but are composed of several clusters ranked internally based on socio-economic status. Scholars generally agree that Marathas are the dominant caste in Maharashtra. However, Vora (1999) argues that only one or two dominant lineages in each village have power and influence within the Maratha community. Historically, Karve (1968) claims the social roots of all Marathas lie in Kunbis, which means peasant. However, some Marathas believe they are descendants of Kshatriyas, the ruling caste, and claim hereditary entitlements to high offices and higher social positions than the majority Kunbis peasants. Nonetheless, the Maratha caste cluster interacts as one social spectrum glued together through kinship networks, cultural codes of *balutedari* (patron-client relationship), and hypergamy (the exchange of brides between the rich Kunbis and poor aristocratic Marathas).¹¹ Such social practices and maintenance of kin relations between Marathas and Kunbis have enabled them to reproduce as a dominant caste cluster in Maharashtra (Carter 1974, Lomova-Oppokova 1999). Attwood (1992) argues that the reason for flexibility in social relationships and the possibility of mobility within the Maratha cluster is due to the geographical specificity of Maharashtra as a semi-arid agricultural zone.

The social and geographical uniqueness met with another distinctive feature of the Marathas: the demographic strength of the caste group. According to the 1931 caste census, Maratha-Kunbis were 31.2 per cent of the total population, making them the single largest caste group not only in colonial Maharashtra but in the whole of India. The proportion of Marathas in Bombay Deccan (forming most of Western Maharashtra) was even higher, 41 per cent, and the caste cluster possessed an extensive amount and relatively better quality of agricultural land (Lele 1990, Vora 1999). Some argue that these salient features—a typical social composition and close kinship relations, climate condition of Bombay Deccan, and ownership of agricultural land—are central to reproducing the dominant status of Marathas. However, this paper demonstrates that these features are insufficient to explain the rise of Maratha landed elites in the late nineteenth and early twentieth century. Instead, it shows that colonial agrarian policies, the building of irrigation canals, the promotion of sugarcane cultivation, and the formation of credit and cooperative societies during colonial times economically empowered Maratha elites, who later mobilized other Marathas to build political domination in the democratic framework of postcolonial India.

Irrigation, Cane, and Sugar Industry in Bombay Deccan

After defeating Peshwas in 1818, the British imposed the ryotwari land revenue system, built railway networks and roads in Deccan, and paved the way for the region to be incorporated into the capitalist world economy. However, the commercialization of land, labor, and agricultural products resulted in a) the emergence of moneylenders and b) heightened indebtedness among the poor peasantry. In response, the British administration established credit societies in villages to "protect" poor peasants, but rich peasants took control of credit institutions and reaped the economic benefits (Kumar 1968). Before 1818, Kumar argued the dominance of Marathas was restricted to the social sphere. By the end of the nineteenth century, however, the rich peasants accumulated capital at an increased rate, sold crops at the highest price, became moneylenders to small peasants, and invested money in improving their possession of landholdings in villages. These rich peasants predominantly belonged to the traditional landowning elite of the Maratha caste, which held high offices during the Peshwa rule.

Charlesworth (1985) accepts Kumar's thesis and argues that the spread of railway networks in remote areas, capitalist markets in agriculture, irrigation schemes, and cultivation of cash crops during British rule led to the formation of distinct strata of rich peasants by the end of the nineteenth century.¹² But, he adds, that this is truer for the Deccan districts around Pune than the other parts of Bombay Presidency. The construction of irrigation works in the canal districts of Deccan changed the socio-economic structure of the area in the early decades of the twentieth century. Beginning in the late nineteenth century, the British administration began constructing irrigation canals in the Deccan's famine-prone

regions, which relied upon expensive and inefficient well irrigation. The canal systems were built originally to safeguard farmers' interest in drought years so that they could use irrigation water to cultivate staples of the area: jawar and bajra. However, eventually, Deccan irrigation works ended up making Maharashtra a sugar bowl of India and the Deccan region heaven for peasant entrepreneurship (Attwood 1992, pp. 50-51).

The transformation of canal districts into a sugarcane belt relates to the "problem of unwanted water." In the typical monsoon season, the demand for canal waters would reduce as peasants depend heavily on rainwater. As a result, the Deccan canals started accruing economic losses for the colonial administration. In response, M. Visvesvaraya (then an executive engineer in Pune working for the Irrigation Commission) recommended a policy solution that favored the cultivation of sugarcane which needed ten times more water than jawar and bajra. To make the canal systems profitable, Visvesvaraya proposed a "sugarcane block system" in which cultivators would sign a contract to consume canal waters for a particular block (area) for six years at a fixed rate (Damodaran 2008). The policy accelerated the sugarcane cultivation in the canal region, which rose from 3500 to 8000-acre at the turn of the twentieth century. By the mid-1920s, the value of canal-irrigated sugarcane land rose ten times compared to the previous decade. By 1936 all six major canal systems in the Deccan had been irrigating 40,000-acre of the sugarcane field, making the Deccan cane the most profitable cash crop grown in India (Attwood 1992, pp. 58-75). In this context, scholars of Bombay Deccan generally agree that by the second decade of the twentieth-century one observes an undisputed economic rise of elite Maratha peasants (Baviskar 1980, Chithelen 1985, Attwood 1992 and Mohanty 2009).

Later, the Marathas realized profitmaking in gur (jaggery) businesses from the *malis*. However, the worldwide economic depression of the late 1920s led to a drop in gur prices, under-used canal waters, and a decline in sugarcane cultivation. The Deccan Canals Financial Improvements committee in 1932 proposed tariff protection on imported sugar. In addition, it encouraged the "establishment of sugar factories by offering potential entrepreneurs certain facilities and concessions in securing land on lease, fixation of rents, and supply of canal water at low cost" (Baviskar 1980). The tariff protection on imported sugar and promotion of entrepreneurship manifested in a sugar boom as over a hundred power-driven cane-crushing sugar factories began operating. By the 1940s, the rich Maratha peasants started "organizing themselves co-operatively as owners of a factory would have been the best possible way to refine their cane into sugar" (Chithelen 1985). The cooperative eased capital investment for the individual peasant, subsidized expensive technological facilities for factories, and allowed collective sugar marketing.

In the span of over a hundred years (1818-1947), the British agricultural policies in Western Maharashtra transformed the socio-spatial structure of the region. The policies led to the rise of distinct strata of the prosperous peasantry (belonging mainly to Maratha-Kunbis), who were set to make significant impacts

in guiding the course of the politics and economics of Maharashtra in the post-independence era. After the 1950s, the Maratha-dominated sugar cooperatives remained at the helm of the politics of development in Maharashtra; nonetheless, a noticeable trend to diversify their investments in rural and urban areas created new avenues for Marathas to accumulate more capital.

Conclusion

How to rethink caste-class relations as the capitalist transition continues apace in India? As discussed in the paper, while sociologists such as Srinivas (1987) introduced the concept of the 'dominant caste,' he failed to analyze the class dimension of the caste structure. Similarly, economists often ignored the social category of caste while engaging with India's economic transition from an agrarian to an industrial economy. Although Bardhan (1998) examines the formation of dominant proprietary classes and castes, his analytical frame eschews economic differentiation and rift within a regional dominant caste cluster. This paper addresses this lacuna by historically contextualizing formation, and subsequent strife within the dominant Maratha community as capitalist development evolves in the western Maharashtra region. It demonstrates that securing the dominant position depended on the Maratha-Kunbi's numerical strength, forging kinship network, and, most importantly, the British agrarian policies in the region. The building of water canals, cultivation of commercial crops such as sugar cane, and establishment of credit unions allowed a rich peasantry class to emerge during colonial times. While internally stratified, the Marathas maintained the cohesion of the group by building coalitions, especially in the democratic framework of post-independent India. This was evident in the 1960s when the political economy of the Congress regime in the state further strengthened the colonial dominance of the Maratha caste cluster. The congress rule, synonymous with Maratha dominance, protected agrarian interests, promoted agro-based industries, and supported rural cooperatives. However, as India moved to new political-economic conditions in the 1990s dictated by neoliberal norms and urban imperatives, the Maratha dominance was challenged. Politically, with the decline of the Congress party, one observes the political fragmentation of the Maratha community (Deshpande and Palshikar 1999). Economically, as demonstrated in this paper, landholding Maratha clans in the urban development corridor hugely benefitted from contemporary capitalist development. One of the outcomes of this developmental process in Maharashtra is factionalism within the Maratha community and the demand for reservations.

As the neoliberal capitalist trajectory unfolds in other regions of India, do we encounter a similar social puzzle in which a relatively prosperous community with a dominant caste status claims backwardness and demands reservation? Although the regional context may vary in each case, the two dominant castes in Karnataka – Lingayats and Vokkaligas – have appropriated the 'backwardness for their own benefits' (Deshpande 2014). Similarly, Shah (2015) notes the claim of

backwardness and demands for reservation by the Patidar community in Gujarat as economic opportunities diminished in rural and urban economies.

The framework of historical sociology, 150 years of the regional history of economic transition, social formation, and economic differentiation within the dominant caste group, provides methodological insight into how to integrate the ‘social’ with the ‘economic’ analytically. However, the data and policy-oriented mainstream economic thinking, lacking interdisciplinary vision, appears narrow, incomplete, and even farce. It often rehearses a black-and-white, oversimplified, cropped story of capitalist transition devoid of historical and sociological analyses. In an attempt to build an interdisciplinary dialogue, this paper invites economists to observe a complicated and contradictory picture full of unresolved caste and class predicaments as neoliberal economic development unfolds in India.

Endnotes

1. To understand the difference between neoliberal policies and programs between the Global South and the Global North and the argument regarding the origin of neoliberalism in the Global South, see Connell and Dados (2014).
2. From Bourdieu’s economic field perspective, such opportunities of transcending low status are not a *rational* choice (as classical and neoclassical economists would see it) but a *reasonable* response to an individual’s socioeconomic circumstances.
3. One can find similar instances in other parts of India. For example, in Gurgaon, Delhi Land and Finance (DLF) Corporation developed a private township—a 3500-acre DLF City. Like Magars, the dominant agricultural caste of the region, Jats and their caste affiliation and network prove to be extremely fruitful to the DLF’s success. For details, see Srivastava (2021).
4. Compared to Magarpatta City, the urban process in Hinjewadi and Maan—another suburb of Pune where many landholders also belonged to the Maratha-Kunbis caste cluster—took a different route. The difference lies in the following: Hinjewadi and Maan form a relatively larger area with a more significant population. The state and the market forces played a dominant role in the successive acquisition of agricultural land. Unlike Magarpatta, this intervention by external forces drew complex responses from the farmers, from supporting the project to organizing resistance against the land acquisition. See Sathe (2014 and 2015) and Apurva (2020) for details.
5. The rich and capitalist farmers are conceptualized as those who accumulated capital not necessarily by exploiting agricultural wage laborers but by investing agricultural wealth and profit into a wide array of non-agricultural activities opened by the expansion of the capitalist market and urbanization.
6. See Bardhan (1984) for the failure of land reforms and the ascendancy of rich peasants belonging to the middle caste. See Frankel (1971), Dasgupta (1977), Bagchi (1982), and Dhanagare (1987) for the adverse impact of the Green Revolution on socio-economic inequality in rural India.
7. See Rutten (1995 & 1999) for the case of Gujarat, where one of the main beneficiaries of early twentieth-century economic development and agricultural modernization enabled *patidars* to turn into the hyphenated identity of farmers-traders-industrialists and allowed them to accumulate wealth.
8. For how the implementation of the populist EGS program, that is, “right to employment,” to address rural poverty, initiated in the 1970s by Yashwantrao Chavan, served the interest of the Maratha political elite, see Jadhav (2006) and Patel (2006).
9. For the regional politics and disparity within Maharashtra (i.e., Western Maharashtra, Vidarbha and Konkan), see Mohanty (2009, pp. 63-9).

10. Marathas constitute 31 per cent of the total population of Maharashtra, and they have consistently occupied around 45 per cent of seats in the state assembly. Vora (2009) has shown that the social composition of the Members of the Legislative Assembly (MLA) of Maharashtra has not dramatically changed since the 1960s.
11. Like the 'homogenous' Maratha-Kunbis caste cluster consisting of internal hierarchy, one finds similar integrative and differentiating tendencies within the Patidar community in Gujarat. The economic rise of the dominant agricultural caste, Patidar (erstwhile Kanbi), in the nineteenth century led to economic differentiation within the caste group, and marriage, preferably hypergamy, became a tool to maintain or prove one's true Patidar status in the community. For details, see Pocock (1972).
12. See Upadhyaya (1988) for a similar colonial project of canal irrigation systems in coastal regions of Andhra resulted in the formation of dominant *kammas* as new "rich peasant" class.

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Migration-Led Development in Kerala: Looking Beyond Growth and Remittances

K. Jafar

Kerala's development experience has been widely discussed for its unique features. Largely, discussions on the Kerala model of development and virtuous growth focus on growth and human development. Other dimensions and experiences of regions and groups within Kerala have been understood in a limited way. Its larger impact on Kerala society, including on gender relations, identities, politics, culture, their intersections, and new forms of marginalisation cannot be ignored. This paper explores some of these points and tries to extend the scope of discussion around Kerala's development experience.

Key Words: Kerala model, Virtuous growth, Migration-led development, Marginalisation, Intersectionality

I Introduction

The development experience of Kerala has attracted wider attention for its unique patterns. State's active involvement in the process of development was supported by social and political conditions. The progress in social and human development areas helped Kerala generate economic growth later and maintain its achievements in human development indicators. Studies identify different phases of Kerala's development; it passed through a low growth phase in the 1970s and entered a high growth phase by the late 1980s. By the 1970s, Kerala achieved remarkable progress in human and social development areas, but the commodity-producing sectors remained stagnant (CDS-UN, 1975). This lop-sided development pattern (high social development with low economic growth) became popular as the 'Kerala model of development'. Over time, there have been critiques and questions regarding this model. Some have questioned the existence of such a model¹ and shared concerns about its replicability and sustainability (Parayil 1996, Tharakan 2006, Véron 2001). Some others have highlighted the exclusive nature of this model and identified SCs, STs, and fisher folk in the margins or outliers of the Kerala model of development (Deshpande 2000, Kurien 1995, Raman 2010,

K. Jafar, Assistant Professor, Madras Institute of Development Studies, Chennai 600020, Tamil Nadu, Email: jafkizha@gmail.com

Author thank Prof. Sujata Patel for her support and detailed comments and suggestions while conceiving and revising multiple drafts of this manuscript. The detailed review report from the anonymous reviewer also helped in revising the draft. None of them are responsible for any error remains.

Sivanandan 1979, Shyjan and Sunitha 2009). With new forms of marginalisation, these groups continue in the margin. The marginalised groups are excluded from productive resources, even with popular and radical policies like land reforms. The transformation of politics from public action mode to liberal mode can be linked to widening economic inequalities and abjection² of these vulnerable groups (Devika 2010, 2013).

Discussions on Kerala's migration-led development process often limit their focus on the growth dimensions. A large number of studies focus on the economic mobility and positive aspects of migration and remittances, while a limited number of studies focus on other dimensions (Gulati 1993, Kurien 2002, Osella and Osella 2000). The paper attempts to see the interface between scholarships from economists, sociologists, and anthropologists on Kerala's experience with migration-led development. Along with the secondary sources, it uses the primary evidence drawn from micro-level studies and fieldwork conducted in Malappuram district of Kerala. The district's dominance in Gulf migration and Muslim majority in the district's population set an interesting context to explore the complex process of mobility and stratification in Kerala.

The paper reviews the broad patterns of the migration-led development process in Kerala. Withdrawal of the state from social sector spending and steady growth of private players with remittance inflow in the new growth phase may challenge state's image as a champion of public action and social justice. The section also highlights the importance of remittances beyond boosting household consumption and the distinct role of Gulf migration. The impact of migration cannot be reduced to household remittances; It then discusses the role of migration in shaping gender relations and the way multiple identities such as region, religion and migration intersect in the context of Gulf migration in Kerala. The following section focus on the experience of Malappuram district in Kerala to show how different regions and groups follow the larger patterns. It focuses on the exclusion of marginalised groups from the process of migration-led development and the experience of Muslim Gulfwives to show how culture, religion, family and migration status influence gender relations in complex ways. The last section summarises the discussion and concludes the paper.

II Methodology

The first part of the paper uses secondary evidence to map the broad pattern of Kerala's migration-led development process. It identifies some key areas that are missing from the mainstream discussions and explores the possibilities of connecting them. The sociological approach shows how migration affects gender relations and the intersection of gender with other identities such as religion, region (ethnicity), and other factors. The later part of the paper uses the primary evidence collected through micro studies conducted in Malappuram district and explores how mobility and stratification work in a given context. This includes three household surveys focusing on specific issues related to the Malappuram

district's experience with migration-led development. The first survey was conducted in 2010-2011 in the context of Panchayat election, the first election after revising the reservation for women to 50 per cent in all three tiers of local governance in Kerala. The survey covers 196 candidates contested to three-gram panchayats representing the coastal, midland, and highland regions of the Malappuram district.³ The second survey was conducted during 2011-2012 period that covered 752 households from the same gram panchayats. The study focused on the process of human development among migrant and non-migrant households.⁴ The third survey was conducted in 2015-2016 period that covered 360 households from the same regions (different gram panchayats) and focused on the impact of migration on formal and informal financial arrangements.⁵

III Migration and Development in Kerala: Emerging Trends

Studies have identified different phases of growth which Kerala experienced in recent decades. One can connect them with the radical policies initiated by the state. For several years, it prioritised the social sector, even at the cost of economic growth. It created a rich human capital base, but the state economy could not absorb the educated labour force according to their preferences. This led to a high unemployment rate among the educated youth and a shortage of labour in traditional agriculture and allied jobs (Mathew 1999, Nair 1999). The situation changed in the 1970s when the post-oil boom in West Asian countries created new demand for foreign workers and triggered large-scale emigration of Malayalee workers to Gulf countries (Nambiar 1995, Prakash 1998, Rajan and Kumar 2010, 2011). The inflow of remittances generated by Malayalee migrants in Wet Asia fueled the state economy and led Kerala to a high growth phase by the end of the 1980s. This turnaround in growth was later identified as '*virtuous growth*' (CDS, 2005). The strategies followed in the earlier phase, i.e., investment in human capital and progress in human development, generated this '*virtuous growth*' in the state (Chakraborty 2005, Kannan 2005). This has created new discussions on the relationship between economic growth and human development and possibilities of human capital and human development path to achieve economic growth.⁶

The process of human development generating economic growth continues in the new growth phase. Its earlier achievements in human development, especially education and demographic transition, helped the state improve the per capita income and continue remittance-led growth along with high human development for several years (Kannan 2022). At the same time, the nature of new growth phases has changed in specific ways. A closer look into strategies followed in two growth phases indicates a gradual withdrawal of public investment from mass education. For several years, the share of the social sector in Kerala's total expenditure remained high, and education absorbed a significant share of the social sector expenditure (Oommen 2010: 73). The new growth phase experienced a steady decline in real social expenditure; share of education in total government expenditure declined from 29.28 per cent in 1982-1983 to 17.97 per cent in 2005-

2006 (Oommen 2008). The deficit and burden on the state's finances caused by high social sector expenditure also limit its capacity to continue its earlier strategy of prioritising the social sector (George 1993).

State's withdrawal from education and greater involvement of private players and remittances set new focus and priorities. This has adverse implications for educational development in the state. Many students from marginalised groups are less likely to access private schooling; their parents cannot afford to pay the fees (Dilip 2011, Valatheeswaran and Khan 2018). In the case of higher education, withdrawal of public spending and change in the focus adversely affect students from disadvantaged backgrounds. This has reduced access in the Malabar region (with nearly 41 per cent of the total population in Kerala) and for many students from SC, ST and the backward communities, particularly the Muslims (Nasiya 2022). Due to the increase in private costs, student-financed institutions, non-financial entry barriers, and inadequate attention to the problems of disadvantaged groups, Kerala's educational system is becoming more exclusive (Kumar, and George 2009). The new growth phase, with the active participation of private players in the social sector and growth of remittances, reports steady growth of inequality in the state. Studies have reported sharp differences in household consumption expenditure patterns, especially between migrant and non-migrant households (Aravindan and Menon 2010, Oommen 2014, Sreeraj and Vakulabharanam 2015, Subrahmanyam and Prasad 2008, Jafar 2018).

Role of Household Remittances

The economic dimension of remittances in terms of boosting household expenditure and the domestic economy has been widely discussed. Through diasporas and migrant collectives, they finance a wide range of activities. During the election and major programmes, political parties mobilise resources from party members and well-wishers. The state government also recognises the potential of overseas Malayalees and diasporas in generating financial support and appealed during crises like megafloods and landslides of 2018 and the Covid-19 Pandemic and succeeded in attracting their financial support in the form of local investment, philanthropic support and other means. Similarly, informal collectives, activists, and community leaders also use their connections to generate financial support for migrants for their voluntary activities and charity (Osella 2018). The reverse flow of remittances in terms of diversion from the traditional channels of consumption and investments or money sent to the destinations for helping the migrants (in business or personal crisis), is another area missing from these discussions, and social remittances⁷ are the other two areas left in these discussions.

Gulf-migration: A Different Phase of Migration from Kerala

Kerala has a long history of migration; it had a negative net migration until 1947 (Rajan and Kumar 2010). Scholars have identified different phases of international

migration from India.⁸ An early account from the middle of the 19th century indicates that Malabar region had recruitment centres sending indentured labour and migration of Cherumas (scheduled caste) as a way to escape from the exploitation of landlords' (Joseph 1988: 40). Since independence, Kerala experienced permanent migration of skilled and professional workers to countries like USA, Canada, UK, and Australia, and temporary migration of unskilled and semi-skilled workers to the Gulf or West Asia (Rajan and Kumar 2010: 10-18). While skilled migrants from India continue concentrating in Europe and America, West Asia remains the destination for unskilled migrants from India (Khadria 2009, 2011). To some extent, the early generation of unskilled manual labourers is now replaced with skilled professionals. Compared to the large-scale migration to the Gulf countries experienced across the state, high-skilled and professional migration is limited in its scale. Keralites migrate to other countries and states of India, but their large-scale migration to the Gulf countries is unique in terms of its scale, nature, and impact on the local economy and society. Compared to skilled migration to Europe, the USA, and other megacities within the country, the participation in Gulf migration is wider and inclusive. Low-skilled Gulf migrants, often from coming poor economic backgrounds, send a sizable proportion of their income as remittances. It has contributed more towards reducing poverty and unemployment in the state.

Plight of Inter-State/Domestic Migrants in Kerala

Kerala also attracts a large number of inter-state migrants. Out-migration of workers, aversion of educated workforce towards blue-collar jobs, the higher wage rate for casual work, preference of employers in Kerala for migrant labourers in Kerala and unemployment and crisis in the rural and farming sector, indebtedness, the positive role of the social network of migrants and other factors contribute to increased inflow of inter-state migrants to Kerala. One estimate from 2013 suggests that Kerala hosts approximately 2.5 million (equivalent to around 20 per cent of Kerala's workforce) domestic migrant labourers in different sectors (Narayana, Venkiteswaran and Joseph 2013). The long-term trend indicates that until the 1990s, Kerala attracted more migrant workers from neighbouring states like Tamil Nadu while it attracted more long-distance migrant workers from-1990s (Peter and Narendran 2017). Compared to local workers, migrant workers are more vulnerable; they face challenges in accessing work, better wages, and living conditions. They face constant conflicts and contestations and stay under the state's and residents' surveillance (Prasad-Aleyamma 2017). The state introduced some targeted and innovative interventions for migrant workers including during crises like floods and covid-19 pandemic (Peter, Sanghvi, and Narendran 2020). However, the plight of inter-state migrants in the state, while compared with the local workers, remains a concern.

Migration and Gender Relations

With its remarkable achievements in some areas of human and social development, Kerala's experience shows how higher literacy, education, wider access to public health, favourable sex ratio, and demographic transition influence gender relations. Women played a critical role in making the Kerala model and realising some of its achievements, like family planning (Devika 2002, Jeffrey 2001). At the same time, the promise of higher literacy and female education did not improve women's role in decision-making within a household, control over resources, mobility, political freedom, participation in paid work, and public space (Gardner 2011, Gulati 1993, Kodoth and Eapen 2005, Mukhopadhyay 2007, Scaria 2014). Kerala is an interesting case to see how migration and access to remittance affect these patterns further. Various rounds of the Kerala Migration Survey (KMS) indicate that nearly one in every ten married women in the state is a Gulf wife⁹ (Zachariah and Rajan 2012, Rajan and Zachariah 2018).

The relative absence of women in migration and the concentration of women migrants in specific jobs (like nursing and domestic duties) indicate limited participation of women in the migration (Neetha 2011, Percot and Nair 2011). As per recent estimates, nurses account for 45 per cent of female migrants from Kerala in 2018 (Rajan and Zachariah 2019). It is interesting to note that migration and new opportunities may change the existing gender relations and gender norms related to work in multiple ways. For instance, the nursing job was traditionally considered low status, and men hardly engaged in it. However, the community's perspective and gender norms related to the nursing job changed when migration opened new opportunities (Kurien 2014). Male migration affects women and families left behind in multiple ways. Women from migrant families play multiple roles; they face new challenges and opportunities in the absence of their men (Desai and Banerji 2008, Gallego, Rajan and Bedi 2020, Gardner 2011, Gardner and Osella 2003, Gulati 1993, Zachariah and Rajan 2012). In several contexts, migration affects women's access to resources and controls over them and participation in household decision-making, etc. (Fakir and Abedin 2021, Lamichhane, Puri, Tamang and Dulal 2011, Sinha, Jha and Negi 2012).

The experience of 'Gulf wives' offers many insights into how migration influences gender relations and women's engagement with public space reflects on various institutional practices, including social, political, economic, and cultural factors that function locally (Zachariah, Mathew and Rajan 2003, Zachariah and Rajan 2009, 2012). One of the recent studies compared the experience of Gulf wives and women from non-migrant households in the northern, central and southern regions of Kerala. The results indicate that the husband's migration improves the Gulf wife's participation in decision-making in the household and improves her control over the resources and mobility. Compared to married women from non-migrant households, Gulf wives improved their agency, freedom and access to resources (Sajida 2020). At the same time, male migration adversely affects Gulf wives' participation in paid work; most of them remain as home-

makers engaged in unpaid care work at home, and this may be seen in the light of falling female labour force participation in the state (Abraham 2013, Khan and Valatheeswaran 2020, Menon and Bhagat 2021).

Women's participation and nature of engagement within the house and various spaces outside and can be influenced by religion/culture, norms, migration status, and their intersections. In this process, a particular identity may dominate over others and influence the outcome or become weak in a given context. Different institutions and their practices produce and reproduce crosscutting identities and their impact on women from different communities (Kosambi 1995). Instead of a single marker of inequality, the intersectionality approach allows one to see the intertwined nature of identities and their role in creating the position of privilege and disadvantage and influencing the situation of individuals and groups (Brewer, Conrad and King 2002, Severs, Celis and Erzeel 2016).

Gulf Migration and Malabar Muslims

Besides economic factors, migration of Malayalees can be connected with social considerations, including family, community, cosmopolitan identity and the likely positive impact (Tsai 2016). The state's early social reformation and development have played a critical role towards the progress of Muslims in Kerala in different areas. The active participation of Malabar Muslims¹⁰ in migration, particularly in Gulf migration, can be looked at from multiple perspectives. This should not be limited to a generalised cultural imagining around West Asian Gulf. Several factors make the migration experience distinct in each state; hence, migrants' preferences vary between these states (Osella and Osella 2008). Various rounds of KMS indicate that Muslims dominate in Gulf migration. In 2018, nearly 42 per cent of total emigrants from Kerala are Muslims. While 18 per cent of households in Kerala have at least one migrant, the corresponding share for Muslim households is 33 per cent. For various reasons, West Asian countries continue to be the favourite destinations (with 90 per cent of migrants) of Malayalee migrants over the years (Rajan and Zachariah 2019). Given the active participation of Malabar districts with a significant share of Muslim population, a closer look will provide more insights into the role of region and culture in the process of migration. The long tradition of ocean trade between Malabar Coast and Arab traders could have facilitated cultural exchanges and generated interests beyond the trade. This connection also could have contributed to large-scale Gulf migration in the Malabar region and helped Kerala Muslims succeed in the Gulf migration (Joseph 2001, Khan 2019).

The concentration of migrants from specific regions and groups may create migration chains or networks. For instance, migrants from Malappuram district were found concentrating in Saudi Arabia (Shibinu 2021). In the case of Saudi Arabia, a country that hosts the two holly masjids, other important marks of Islamic traditions, and rituals like Haj and Umrah, religious education plays an important role in accessing basic knowledge about the region, history, culture and

key practices to Muslims.¹¹ As a result, many Muslims, including men and women who had never visited those countries, easily identify the locality and province where the migrant family member is located. Saudi Arabia has made special provisions for granting visas for religious pilgrims participating in Haj (scheduled on specific days every year) and Umrah (throughout the year) for a limited period. The accounts of the early migrants indicate that many of them used this provision; they explored job opportunities and extended their stay beyond the permitted period. Studies have referenced Mappila Muslim migrants using informal networks or illegally continuing their stay after expiring the visa granted (for a limited period) for religious pilgrimages (Khan 2019, Kurien 2014). Some stay longer and seek legal support to continue as migrant workers, while others get deported to their home country.

A comparative study on three ethnoreligious communities from Kerala, Mappila Muslims of northern Kerala, Ezhava Hindus of southern Kerala, and Syrian Christians of south-central Kerala, shows that different identities interact and influence their migration experiences.¹² The community identities and ethnicities (Malabar region historically lags behind the other two regions in almost all indicators of development) 13 represent specific statuses. Their migration experience varies in almost all aspects, including migration, connection with the destination, nature of migration, education, skill-sets and nature of jobs, social-demographic characteristics of their families back in Kerala, and gender relations (Kurien, 2002). The perspective of the sociology of religion helps us understand the critical role of religion in migration. It shows 'how religion can shape migration patterns by determining societal structures such as the social location of groups within society, which in turn influences the fundamental characteristics of groups and gives rise to differential state policies toward them' (Kurien 2014: 534).

IV Kerala's Migration Experience: Micro Evidences from Malappuram District

At the macro level, the process of education and migration-led development continues, but the nature of growth and implications change in specific ways. It is important to see how different regions and groups within the state follow the larger pattern and map their experience. Studies tend to aggregate Kerala's migration experience into some common characteristics related to the economic conditions and key indicators of development. Many highlight the economic conditions in the origin and destinations, i.e., excess supply of educated workforce in origin and the demand for foreign workers in the destination, as the context for large-scale migration from Kerala to the Gulf countries. At the same time, migrant accounts are shaped by regional, cultural, and class identities, differences in education or professional qualifications, the nature of jobs, and other local factors. Some recent studies explore the way tradition and culture, food, fashion, ritual, lifestyle, business, articulation of religious and cultural identities, language, collective formation, and identities move between origins and destinations (Osella and Osella

2008, 2009).¹⁴ The remaining section focus on evidence collected through micro studies conducted in different parts of Malappuram district and attempts to revisit the larger discussion.

Malappuram, one of the Malabar districts, continues sending the largest number of emigrants and receiving the highest amount of household remittances in Kerala (Rajan and Zachariah 2019). According to the estimates of the Kerala Migration Survey 2018, migrant households from Malappuram district received 20.6 per cent of the total remittances Kerala received (of ₹30717 crores). Nearly 33.9 per cent of households in Malappuram districts receive remittances compared to 16.3 per cent in Kerala (Rajan and Zachariah 2019). However, the district holds a lower rank in terms of remittances estimated per migrant compared to districts that have more skilled and professional migrants. District's earlier image as a backward district and Muslim majority in the total district population makes its experience interesting. It offers some critical insights into the exclusive nature of migration-led development and the intersection of gender with other identities.

Mobility in the Margins

Migration and household remittances promoted upward social and economic mobility of migrant families and helped Kerala sustain its record human development with a growth rate. Within the state, regions and communities follow migration-led development differently. Primary surveys conducted in different regions of Malappuram district indicate very limited participation of Dalit /Scheduled Caste households (SC) and Adivasis/Scheduled Tribes (ST) (Table 1). In the case of the first survey, their candidature in a competitive election indicates their relative status, better than others. In the case of the last survey, access to land helped many of the respondents to access the root of migration. However, the majority of households from these two marginalised groups do not have access to any form of capital and the possibility to participate in migration. There are many instances where migration does not lead to upward social or economic mobility. For many, unsuccessful migration and the cost of migration lead to vulnerability. Nearly half of the fishing households in the coastal villages have at least one member ever migrated. However, most of them are currently returned; many have returned after a short duration (due to poor earnings, the insecure nature of the job, accidents during fishing activity, etc.) and are living with a huge financial burden (Jafar 2018).

For those who managed to migrate from these marginalised communities, possessing land and assets helped some of them mobilise the money required for migration. In some cases, they received support from another affluent migrant family, often with long years of association of working for such families. However, most of these households need access to such physical or social capital¹⁵ and social networks; migration does not emerge as an effective strategy to overcome the vulnerability. The absence of these marginalised communities, identified as the 'outlier' of the so-called Kerala model of development, indicates

the exclusive nature of the migration-led model and limited mobility in the margins. Considering the positive contribution of migration in reducing poverty in the state (Zachariah, *et. al.* 2003: 63), promoting safe and successful migration among these communities is a priority. For various reasons, these groups continue on the margins of development; popular policies and flagship programmes like land reforms, decentralisation, Kudumbashree mission, MGNREGS, etc., have limited impact on their lives.

Table 1: Share of Migrant Households* in Malappuram District (%)

Social Groups	2010-11 (n= 196)	2011-12 (n= 752)	2015-16 (n= 360)
Forward caste	6.67	1.41	3.73
OBCs	21.33	3.95	3.11
SCs	2.67	0.85	1.24
STs		0	0.62
Muslim/Christian	69.33	93.79	91.3
Total	100	100	100

Note: *Migrant households: At least one migrant or returned migrant

Source: Jafar, 2023.

The Experience of Muslim Gulf-Wives

One of the earlier estimates indicates that Malappuram district accounts for 25.8 per cent of all Gulf-wives in Kerala where ‘the husband of one in every four married women is living abroad’ (against 1 in every 10 for Kerala). Muslim Gulf wives comprise more than half of the total Gulf wives in the state (Zachariah and Rajan 2012: 194, Rajan and Zachariah 2018). The experience of Muslim Gulf wives offers some interesting insights into how multiple identities like gender, migration status and religion intersect and influence gender relations in the state. Muslim Gulf wives independently engage with public spaces like banks, local government offices, children’s educational institutions, and hospitals but keep away from local politics, self-help groups, and casual wage work, including MGNREGA (Jafar 2018). The first set of places is often seen as neutral or need-based engagements (especially in the absence of migrant husbands/male family members). In contrast, the latter is seen as optional and monitored differently.

The evidence collected during the 2010 Panchayat election in Kerala shows how migration status, religion, and family influence women’s participation in politics and competitive elections. The absence of husbands discourages Gulf wives from participating in local politics and competitive elections. Only two gulf-wives (out of 196 total candidates) contested from three-gram panchayats. Both candidates relied on their families to manage the election process, campaign, documentation and other formalities. Interestingly, one of the candidates reported that her husband came and managed the entire election process; she did not know the nomination details, election campaign, expenditure, etc. After the election, her husband returned to Gulf and came again shortly to submit the documents on

election expenditure to the concerned office. For the second candidate, the husband's family provided all the support required in his absence (Jafar 2013). Overall, we find that migration status does not directly contribute to candidature, but remittances continue financing political parties and their election activities.

In many contexts, cultural and religious factors discourage Muslim women from contesting in competitive elections. Being the first election after implementing the 50 per cent reservation for women, political parties had to identify potential women candidates, often without prior experience in local politics and leadership. By considering the challenges in identifying Muslim women candidates, especially in Muslim-dominated places, community leaders and authorities representing traditional and conservative Muslim organisations became flexible. They allowed Muslim women to contest in the 2010 local election. However, some leaders changed this position and discouraged political parties from fielding Muslim women candidates in the recent elections.¹⁶ The concentration of voters supporting a specific party also may lead to situations where the opposite parties find it difficult to contest the election. When such seats become reserved for women and SC or ST, it leads to complexities in identifying the candidates. In one of the coastal villages with a Muslim majority and supporters of the Indian Union Muslim League, the local party approached a young Muslim woman to represent them and contest in the election. She accepted to submit her nomination only after she consulted and got permission from the Imam (who leads the prayers and rituals) from the local Masjid (Jafar 2013). The political party considered her image as a traditional Muslim among the local Muslims for winning the election.

In another context, a local political leader approached one of his relatives and negotiated to make a young woman contest from the gram panchayat ward where he used to contest. For specific reasons, another young woman from the same family (a Gulf wife, younger sister-in-law of the primary candidate) was identified as the supporting candidate (a backup in case the main candidate's nomination gets rejected on technical grounds). Both sisters submitted their nominations to the concerned office, and this was telecasted on a local TV channel, and the husband happened to see the same. As the Gulf wife could not get the support of her husband, she decided to withdraw her nomination at any cost. Only after she started fasting and refused to take any food did others agree to her demand to withdraw her nomination (Jafar 2013). These instances indicate that the family, often driven by culture/religion controls Muslim women's engagement in local politics and discourage many potential young Muslim women from contesting in the election.

In many contexts, the popular understanding of Muslim women's agency and subjectivity fails in conceiving agency within 'irrational' acts. For instance, Muslim women's veil is primarily seen as a symbol of subordination or as a strong marker of resistance. The recent debate around the banning of Hijab in educational institutions in the southern state of Karnataka gives some insights into the limited choice available to Muslim girls; to choose between education or defend the

markers of cultural identity (Arafath and Arunima 2022). In such contexts, 'intersectionality provides a critical lens to analyse articulations of power and subjectivity in different instances of social formations (economic, political, social and cultural), an intersectional approach to agency... and would turn its focus instead to specific contexts and articulated social formations from which different forms of agency and subject positions arise' (Bilge 2010: 23). In some contexts, one particular identity may take 'one away from other social identities and lend importance to social interactions (Mehrotra 2013).

V Concluding Remarks

The paper attempts to map Kerala's experience with migration-led development beyond the growth story and popular narratives around the state's role in promoting distribution and human development. The Kerala model of development and virtuous growth occupies an important place in the recent debates on Kerala's development experience. While it is essential to map different phases of development and factors that link them, the discussion need not be limited to these aspects alone. The recent experience indicates that the education and migration-led development process continues, but the nature of this process changes as the state withdraws from financing social sectors. The active participation of private players with more involvement of remittances changes the priorities and makes Kerala's development process more exclusive. The differential access to remittances contributed to the growing inequality in the state. Within the state, each group and region follow the larger model differently. The plight of inter-state migrants in Kerala and limited participation of households from marginalised communities in migration indicate the exclusive nature of migration-led development in Kerala. The varied experience of regions and groups challenges its earlier records in social development and public action, delivering social justice.

The discussion suggests that non-economic factors also influence the nature and pattern of migration and its impact on both origin and destinations. For instance, a closer look into Kerala's success in Gulf migration and active participation of Muslims and Malabar region can explore multiple connections between the Persian Gulf and Malabar. It emphasises on mapping the distinct experience of migration and its varied impact, instead of generalised accounts. Migration and access to remittances influence gender relations in different ways. The intersection of multiple identities like gender, religion, caste, and migration status makes this complex. Studies report a sharp difference in how migration influences women's status in different communities (Kurien 2002, 2014). The experience of Muslim women in Kerala shows that migration status positively influences the participation of Gulf wives in household decision-making, control over resources and mobility of women from migrant households but adversely affects their participation in paid work (Sajida 2020). The absence of husbands

discourages the Gulf wives from participating in local politics and competitive elections or makes them passive actors.

Besides the mainstream discussion followed in economics and development, the discussion explores the possibilities of sociological approaches, especially in mapping the relationships between migration and identities formed by gender and religion. With given challenges and opportunities, the experience of Muslim Gulf-wives in Malabar offers some insights into how migration, religion, and region are configuring gender relations. Access to remittances and multiple roles in the family empower them in certain areas while it does not help them in other areas like engaging in public spaces where family and religion become more active. In some contexts, their personal capabilities gained through education or financial independence may help them in overcoming such controls. The discussion maps some potential areas where the approaches and existing research can be extended.

Endnotes

1. Even if we do not call this as a model or dismiss the existence of a specific plan or strategy followed earlier, one need to recognize the fact that Kerala experienced a unique development pattern for many years. This could have evolved out of its social and political processes over the years.
2. 'Abjection' refers to the social process by which the normal, the possible, the dominant, the sensible and the mainstream are produced and supported by the creation of a domain of abnormality, impossibility, subservience and marginality' (Devika 2013).
3. (Jafar 2013)
4. (Jafar 2018)
5. Jafar, K. (2017). 'The Impact of Regional Diversity, Remittances, and Culture on Local Finance: A Study of Malappuram District, Kerala'. Report submitted to the ICSSR New Delhi and CSD, Hyderabad.
6. Kerala's experience depicts the dynamic relationship between economic growth and human development two ways; where economic growth leads to human development or human development achievements contribute to economic growth.
7. In multiple forms including as donation/contribution made 'in the form of religious buildings and practices, educational institutions, vocational aspirations and possibilities, celebrity NRI politicians, or hybridised cultural norms' (Tsai 2021: 248)
8. One of the studies identifies four phases: first phase (1834–1910) with steady increase in the size of indentured labour emigration); second, (1910–15) with end of indentured labour emigration; third, (1921–30) with migration of workers to plantation areas of Ceylon, Burma and Malaysia) and fourth by 1938, with the end of kangani/maistry form of emigration and beginning of voluntary labour migration (Jain 2011). Another study identifies three phases namely, indentured labour migration (1834–1910), emigration under Kangani system (1910–35) and free migration (1936–47) (Rajan and Kumar 2010: 2–10).
9. The term "Gulf wives" refers to married women whose husbands are, or have been migrants. They include women whose husbands were migrants at the time of the survey and whose husbands had returned after migration to the Persian Gulf countries (Zachariah, and Rajan 2001). Studies often consider 'Gulf-wives' as a subset of 'women left behind' (WLB). Since more than 95 per cent of the total married women left behind in our sample are Gulf-wives, the present study use 'Gulf-wives' as a common category which includes all women left behind. Compared to other women from migrant households, Gulf-wives face certain

challenges and opportunities more frequently and the same factor may justify this classification.

10. Malabar Muslims are often identified as Mappila/Moplah Muslims; they represent a distinct identity.
11. This can be considered as some kind of pre-departure orientation or information.
12. Author finds ethnic behaviour as 'kaleidoscopic', where ethnicity allows to realign and reformulating of social relationships in the disintegration and transformation of communities and maps the changes in their social structures.
13. Malabar initiated the social reformations and development of education and health very late and this difference in regional development continued for several years (Kabir 2002).
14. Literature and popular media especially films capture some of these changes in interesting way. They narrate the transformation of families through migration, image of the migrants and negotiations.
15. A network or institution can improve its members' capacity to access limited resources or spaces. Social capital means "features of social organisation such as networks, norms and social trust that facilitate coordination and cooperation for mutual benefit" (Putnam 1995: 67).
16. During 2021 assembly election, Muslim leaders openly criticised Muslim League for fielding a woman candidate. A woman candidate contested from a constituency which traditionally elected Muslim League candidates but she could not win the election.

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Gig Economy Workers' Livelihood: A Qualitative Study of Ride-Hailing Platforms in Bangalore City, India

Ananya Radhakrishnan and Namrata Singha Roy

Today's dynamic labor market, driven by technological platforms, leads to a new form of employment known as the Gig Economy. While the Gig Economy is characterized by new levels of flexibility, autonomy, and freedom, it is also fraught with risks due to a lack of regulation and security. This study attempts to understand the nature of gig work, and the factors contributing to its growth. It also examines the associated challenges and develops potential solutions for policymakers. An in-depth interview has been conducted with gig workers associated with two leading app-based cab service providers in Bangalore city for this study. While the study addresses the types of flexibility and autonomy enjoyed by gig workers, it also highlights the paradox of 'flexibility' and pitfalls associated with gig work. The study concludes with specific initiatives that the government and corporates can undertake to create a conducive environment wherein all the economic stakeholders can thrive.

Key Words: Gig economy, Digital, Employment, Working conditions, Flexibility, India

I Introduction

A digital platform economy, popularly referred to as the 'Gig Economy', is one of the most notable developments in the 21st-century job market. In terms of definition, the gig economy is "the collection of markets that match providers to consumers on a gig (or job) basis in support of on-demand commerce. In the basic model, gig workers enter into formal agreements with on-demand companies to provide services to the company's clients. Prospective clients request services through an Internet-based technological platform or smartphone application that allows them to search for providers or specific jobs. Providers (i.e., gig workers) engaged by the on-demand company provide the requested service and are compensated for the jobs" (Donovan, et. al. 2016). Thus, the gig economy is characterised by short-term contracts or freelance work instead of traditional

Ananya Radhakrishnan, Student, B.A. Economics, Political Science and Sociology, Department of Economics, Christ University, Bengaluru 560029, Karnataka,
Email: ananya.radhakrishnan@arts.christuniversity.in, ananyaradhakrishnan@gmail.com.

Namrata Singha Roy, Ph.D., Assistant Professor, Department of Economics, Christ University, Bengaluru 560029, Karnataka, E-mail: namrata.singharoy@christuniversity.in

‘permanent’ jobs. In lieu of a fixed wage, gig economy workers typically get paid for each ‘gig’ they undertake. The novel aspect of gig work is that the labor supply matches the labor demand through an ‘online platform’.

The Growth Story of the Gig Economy in India

The Digital Revolution in India caused by explosive internet penetration has made smartphones and cheap data affordable to millions (Radhakrishnan A. 2020). With a large working population and workforce growing by a whopping four million every year, the advent of a gig economy has impacted the Indian labor market to a large extent. Thus, digitization, internet penetration, a technologically skilled workforce, advancements in information technology, alongside a booming startup culture, propel India's gig economy. Over the last few years, we have seen the exponential growth at which online service-providing apps such as Uber, Ola, Swiggy, or Zomato have taken over different sectors of the Indian market. These companies make up the largest employers of India’s gig economy, and hence India has now become one of the largest hubs worldwide for the gig economy (Radhakrishnan A. 2020).

According to a McKinsey report, approximately 20-30 per cent of the total workforce in developed countries is engaged in some independent work (Manyika, *et. al.* 2016). Another study titled ‘Insights into the freelancers ecosystem’ conducted by PayPal with 500 Indian freelancers in 2017 state that 41% of Indian freelancers have witnessed significant growth with 80 per cent of them working with international as well as domestic clients. App-based technology has increasingly replaced intermediaries and directly allowed buyers and sellers to contract work. Platforms such as Upwork, Flexing It, and TeamLease are pioneers at the Indian forefront regarding gig work. According to the India TeamLease report (2019), in the 2018-2019 second half, approx. 1.3 million workers became part of the gig economy, which boosted growth by 30 per cent compared to the initial half.

The Legal Framework for Gig Workers

One of the chief characteristics of gig workers is that they are generally considered ‘independent contractors’ and not ‘employees’ in the traditional sense. In conventional understanding, an employee is one, who provides services for an employer, and the employer has control over what he will do and how. On the contrary, an independent contractor also works for employers, but here employer has control only over the work done but not the method of acquiring that. Thus, it would be important to note that most gig platforms have been careful to describe their drivers as ‘partners’ and not ‘employees’, classifying them under an ‘independent contractor’ category. Since gig workers do not fall under the purview

of labor laws, firms are not obligated to provide social security benefits that are generally available to employees.

Over the last few years, the size of the workforce in the Indian gig economy has been ballooning. As per 'Online Labor Index' created by Oxford Institute, India is leading the global gig space with over 24 per cent of the online labor market (Kässi, O. and Lehdonvirta, V. 2018). According to the NITI report, it is estimated that in 2020-2021, 77 lakh workers were engaged in the gig economy and they constituted 2.6 per cent of the non-agricultural workforce or 1.5 per cent of the total workforce in India. However, the fact that they continue to lack any form of social security benefits remains highly controversial. In 2019, the Ministry of Labor and Environment introduced the Code on Social Security. According to the new Code, the Central Government can formulate suitable welfare schemes for the unorganized sector from time to time on issues about life and disability, death, health and maternity benefits, old age protection, and so on.

However, the vast majority of gig workers fall under the unorganized sector, hence deprived of the 'Employees Provident Fund' and the Employees' State Insurance Schemes. The new draft law proposed by the Ministry of Labor and Employment (2019) keeps gig work outside the traditional employer-employee relationship and defines a gig work platform as an online-based platform where organization or individuals can solve specific problems or provides services against payment. The code does envisage social security benefits for both the platform and gig workers. However, this still does not recognize gig workers as 'employees'. Thus, although the code does not equate gig workers with traditional employees, it does offer them certain benefits as directed by the government. The gig platform and the workers are listed under 'unorganized worker'. They are deprived of some social security benefits available to the organized sector. These benefits could range from insurance and maternity benefits to pension and gratuity, typically partially funded by the employer. Since the Wage Code 2019 does not apply to gig workers, it does not offer minimum wage requirements. The Social Security Code 2019 has met with mixed reactions. While the government's move to introduce such a code is certainly a step in the right direction, the mechanism has been left mostly open-ended and has a long way to go.

II Literature Review

To understand the nature and impact of the gig economy worldwide, the study has explored existing literature in journal articles, newspaper and blog articles at a national and international level. The Technological Revolution, also known as the Fourth Industrial Revolution, has paved the way for significant changes in the nature of work. Djankov and Saliola (2018), in their article, present findings from the World Development Report (2019) and mention that as a consequence of the overall development and distribution of digital infrastructure, there is an enabling environment in which on-demand services can thrive.

Regarding the nature of Gig Work, Wood, *et. al.* (2019) posits that one of the differentiating factors of gig work is the platform-based 'rating systems'. This type of management can be understood as a customer-based management strategy significantly different from the traditional Taylorist approach. The workers were given relative freedom to do as they wished, and the 'control' would be established once the work was completed rather than during it.

In another study by De Ruyter and Brown (2019), they state that the types of jobs available in this economy have low entry barriers. The authors address the issues and challenges associated with 'traditional labor markets'. Gig workers appear to be predominantly young people who are either actively searching for employment or currently studying. Thus, gig work is more of a 'temporary process', until they get access to more standardized employment forms.

Several debates have surrounded the perceived advantages and disadvantages of gig work in the academic world. According to Kenney and Zysman (2020), the platform economy is "one in which social and economic interactions are mediated online, often by apps". The 'Utopian' view is that emerging techno-economic systems allow society to be reconstituted, allowing producers to become 'proto-entrepreneurs', that can work on flexible schedules and benefit from these platforms. Conversely, the dystopian view states that new technology will result in undesirable consequences, with digital machines and artificial intelligence displacing work for a large popular population section.

Riley J. (2020), mentions the need for some regulation of the gig economy. According to his study, gig workers deserve basic market protections like any other employee. The existing regulatory initiatives mostly concern consumer protection issues and eliminate unfair competition among sectors. The paper posits that a potential solution would be to introduce a scheme that provides protections similar to those available to 'Small Business Workers' in unique commercial relationships. Another study by Gross, *et. al.* (2018) highlights the issues brought by the gig economy and its flexible employment patterns, emphasizing a need to understand and consider the view of work from a 'well-being' perspective, too, not just from an economic or employment law perspective.

Several web-based reports and news portals published reports on Gig economy. According to a Digital Future Society report (2019), India is the second-largest freelancer market, and this app-based technology does away with the middleman. Also, from the recruiters' point of view, allowing gig work is cost-efficient. They generally do not provide paid leave or health care (and other securities) to gig workers as they do to full-time workers.

In another report published in LiveMint by Salman and Varsha (2019), Delhi has emerged as a leading destination for migrant workers joining the country's tech-enabled gig economy, moving Bangalore to second place. Over the last eight years, two app-based cab service providers have collectively employed approximately 1.3 million drivers. Sindwani P. (2019), in her article published in Business Insider, mentioned that India is now the fifth largest country for 'Flexi-staffing'. It added 1.2 million Flexi workers in 2015 and is predicted to employ

nearly three million by 2021. The joblessness among India's urban educated and uneducated youth looks at the gig economy as a 'stop-gap' solution until market conditions improve. The report posits that several workers join the gig force as a last resort, not a permanent career choice. As a result of the lack of regulation, gig workers find themselves working too long hours to meet incentives put forth by the platforms. Indian HR firm TeamLease estimates that 13 Lakh people have added to the gig economy in the second half of 2018-2019, showing a 30 per cent growth relative to the year's first half. Metros such as Delhi and Bengaluru emerged as the biggest drivers of this sector. The findings also reveal that 2/3rds of the workforce will be under 40 years.

Bhattacharya S. (2019) has published a summary report of a survey in the Economic Times. The survey was conducted by TimesJobs on June 20th, 2018, to study India's emergence of the gig economy. Analysing 2100 HR professionals' responses across different verticals, the study reveals a shift in how businesses operate. The gig economy benefits from cost-saving perspectives and also in terms of gaining competitive advantages. The increased dependence on a 'fluid workforce' disrupts the traditional permanent jobs model among organisations, large or small. According to the respondents, freelancers' largest employers emerge from the IT and Tech, Media and Communications, and Events Sector. The report states that the main reasons for the rise in freelancing are the flexibility of work and easy access to technology, followed by a surge in mobility and work variety.

The rapid rise in popularity of app-based platforms has dramatically transformed consumer behavior. This shift in consumer behavior has also led to the simultaneous creation of new forms of employment to fulfill the demand. It is a phenomenon that is likely to have a profound impact on the nation's social and economic fabric.

In the academic world, at the global level, there is a fair amount of literature regarding the perceived risks associated with gig work and a call to world governments for regulation and inclusion of labor laws to protect gig workers from potential exploitation. However, there is considerably less research done on the nature or impact of India's Gig economy. Thus, the study aims to fill gaps by shedding light on the nature of gig work, the factors contributing to its rise, and its impact on the economy.

III Research Objectives

With this background, the present study has the following objectives:

- To understand the various factors that lead people to join this form of work
- To compare and contrast the perceived advantages and disadvantages, as well as the risks associated with the gig economy
- To analyse the ongoing debates surrounding the regulation of gig work and suggest potential solutions for policymakers

IV Methodology

The study is primarily qualitative. It also uses the Interpretivist approach, which states that multiple realities exist. These realities are constructed based on individual experiences. Thus, the study attempts to understand the phenomenon of gig work based on its stakeholders' lived experiences. The study was conducted in February 2020. Since the choice of individuals who need to be interviewed is fixed ex-ante by judgment, the researcher uses non-probability sampling. To ensure that the respondents were direct stakeholders of the gig economy, the purposive sampling method (a type of non-probability sampling) is used, specifically, a homogenous sample. Face-to-face interviews were conducted using a semi-structured fixed interview schedule and additional follow-up questions based on the responses received.

In India, the gig economy primarily constitutes ride-hailing platforms and food-delivery platforms. Due to the paucity of time, the study focuses only on cab aggregators. It is an employer-employee study. The research includes interviews with employers and gig workers of the ride-hailing platforms of two cab-service providers. The names are changed to X and Y for privacy protocol. The interviews aimed to understand the socio-economic background, benefits, and challenges associated with this work. Twenty face-to-face interviews were conducted with the X and Y car service driver-partners in Bangalore. Apart from this, three interviews of individuals representing the companies were conducted. This was done to gain additional insights from industry experts regarding the functioning and future of gig work.

V Observations

For ride-hailing platforms such as X and Y, reduced costs are the primary factor causing their rising popularity. The platforms are aggregators of supply and demand, wherein the drivers are not company employees. They are independent contractors.

The structured questionnaire includes the respondents' details, like age, sex, educational background, state of origin, the duration of their association with the cab aggregators, and questions about their previous jobs and experiences that led them to join the ride-sharing market.

Table 1: Demographic Details of the Survey Respondents

	absolute number	Percentage
<i>Number of gig workers</i>		
Gig workers_ Y company	11	55
Gig workers_ X company	4	20
worked for both platforms	5	25
Total	20	100

Contd...

Table 1: Demographic Details of the Survey Respondents

	absolute number	Percentage
<i>Number of gig workers</i>		
Gig workers_Y company	11	55
Gig workers_X company	4	20
worked for both platforms	5	25
Total	20	100
<i>Location</i>		
Karnataka	18	90
Other than Karnataka	2	10
Total	20	100
<i>Education</i>		
Primary	3	15
Secondary	7	35
Higher Secondary	5	25
Diploma or an Undergraduate Degree	5	25
Total	20	100

Source: Author's calculation from primary data.

Table 1 summarizes the demographic details of the respondents. Out of the 20 interviewees, 11 individuals (55 per cent of the sample) were driver-partners of Y company. 4 individuals (20 per cent of the respondents) were driver partners of X company. 5 respondents (25 per cent of the sample) worked for both platforms. The study also includes three interviews of employees representing the companies. All 20 of the driver-partners interviewed were males. This finding coincides with the general cultural setup in Indian society, wherein females joining gig form of work is rare due to a host of taboos and safety concerns. 6 out of 20 (30 per cent of the driver-partners) interviewed fell under 18-25 years age bracket. 12 out of 20 (60 per cent of the respondents) were in the 26-35 years age cohort, and the remaining 2 respondents (10 per cent of the driver-partners) were in the bracket of 36-45 years. Apart from the structured questions about their age, the respondents were also asked to gauge a driver partner's average age. It was interesting to note that most respondents stated that this work welcomes people of all age groups. However, they gauged the average age between 25 to 35 years. Of the 20 respondents, 18 comprised 90 per cent of the sample from Karnataka. Two respondents hailed from the State of Assam. Most respondents were from small towns in Karnataka, Bangalore's peripheries, namely Ramanagar or Hubli. Three out of 20 (15 per cent of the respondents) attained primary-level education. On the other hand, seven respondents (35 per cent) had attained secondary-level education. Five out of 20 (25 per cent of the respondents) completed the secondary level (PUC), while five respondents (25 per cent of the respondents) held a Diploma or an Undergraduate Degree.

According to the X company representative- *“Initially, the drivers used to be from the big cities like Bangalore or Bombay. However, this has changed*

over the last couple of years. The demand is very high, but the supply does not match it. We now go into smaller towns of Karnataka like Mysore or Hubli, and recruit individuals from there”.

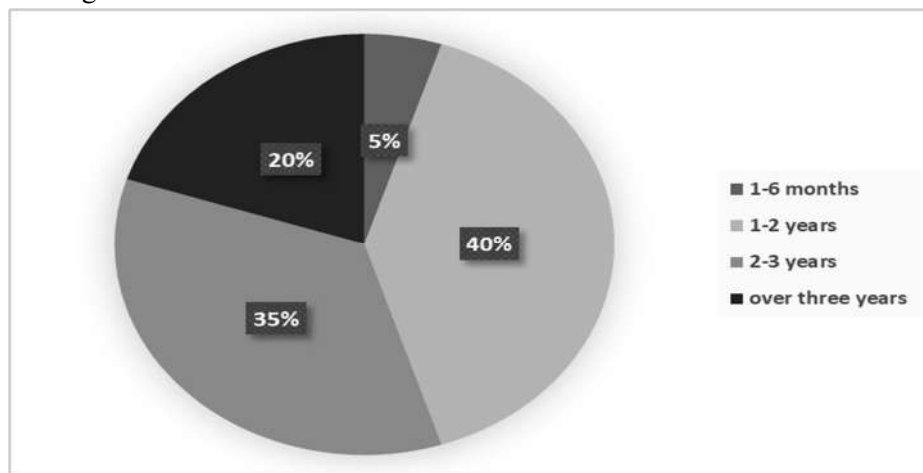
When the ride-hailing platforms first came about in India, the driver partners' incentives were very high. As a result, many individuals left their traditional employment to enter this new sphere of work. However, over the last couple of years, the companies have drastically rolled back on the gig workers' incentive. Thus, a supply-side deficit came about. To meet the rising demand, cab aggregators ventured into smaller towns and rural areas to recruit driver-partners. Therefore, this has also led to inter-state migration. In India, the Gig Economy comprises mainly informal or blue-collar labor. Thus, it is characterized by low barriers at the entry level. The findings of the interviews highlighted that educational qualifications are not a barrier for such jobs. While some respondents held a Diploma, others did the same job without completing their secondary education level.

Here we have summarized their responses under various headings-

Experience with the Gig Platforms

Figure 1 gives a pictorial presentation of the respondents' experience with the Gig Platforms. Out of the total respondents, one respondent (five per cent of the total respondents) fell under the category of 1-6 months of work experience. Eight respondents, comprising 40 per cent of the total pool, claimed to have 1-2 years of experience. On the other hand, seven respondents (35 per cent), had 2-3 years of experience as a gig worker. Lastly, four out of the total (20 per cent of the respondents) had over three years of experience with the ride-hailing platforms.

Figure 1: Percentage Distribution of the Respondents Concerning Experience with the Gig Platforms



Source: Author's calculation from primary data.

Previous Employment

The respondents were asked about their past jobs before entering the gig market. 8 out of 20 (40 per cent of the respondents) stated that their previous jobs included some form of driving. A trend in the market is that individuals who join the cab aggregators generally have some driving experiences for private parties or as auto, bus, or truck drivers. Four respondents came from other industries, previously working in occupations such as Security Guard, Electrician, Book Salesman, etc. Some respondents revealed additional information about their journey to the gig market. A few of them stated that they had vehicles back in their hometowns, in the rural parts of Karnataka, and they saw this as an opportunity to improve their standard of living. A couple of them stated that they did not view this as a permanent career choice and would only continue working here until they had paid off certain debts or loans. One of the respondents mentioned that he held a Diploma in Computer Science. He had worked in the formal sector, but Demonetization had negatively impacted his career. He decided to join the Y company as a driver-partner while looking for alternative career options.

Is This Your Primary Source of Income?

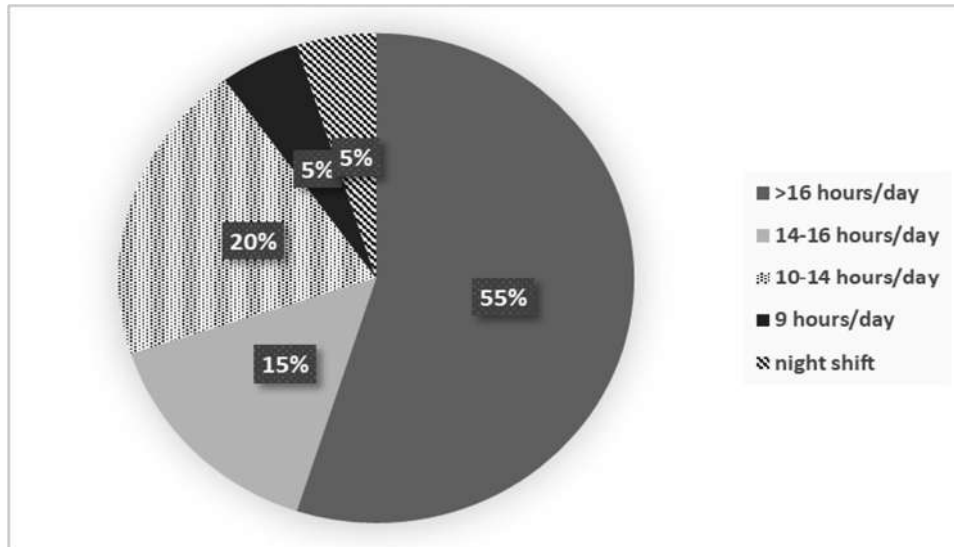
The respondents were asked if they regard their revenue from the gig platforms as their primary income source or merely an additional or supplementary source. This also gives insights into the potential of gig work as a permanent career path. 16 out of 20 respondents (80 per cent) considered this particular job as their primary and only income source. Two respondents indicated that it is a part-time job. Another two noted that this is their primary income source, but they have other supplementary sources.

The next segment of the interview comprised questions about a gig worker's daily routine from the X and Y company. The driver-partners were asked questions about their daily routine, working hours, breaks, holidays, and support provided by their companies in the form of medical compensation or otherwise.

Working Hours and Breaks

Flexibility is one of the chief characteristics of gig work; workers can choose the type of work they wish to take up, the time and place factors, the amount of work they undertake, and how they complete tasks. This sense of perceived autonomy and freedom primarily attracts individuals to the gig economy. According to De Ruyter, *et. al.* (2018), there are challenges associated with the 'transitional labor markets. Gig workers appear to be predominantly young people actively engaged in the job search or are currently studying. The evidence suggests that gig work is more of a 'temporary process' than becoming a sustainable career choice until they can access a more standard form of employment. Figure 2 provides information on the working hours per day of the respondents.

Figure 2: Percentage Distribution of the Respondents with Respect to Working Hours Per Day



Source: Author's calculation from primary data.

11 out of the 20 respondents (55 per cent) stated that they worked 16 hours or more daily. Three respondents (15 per cent of the pool) indicated that they followed schedules that were over 14 hours every day. Four out of the 20 respondents (20 per cent) stated that they worked for over 10 hours a day. One respondent said he generally preferred to work the night shift, starting work at midnight, as the incentives are higher. One respondent stated that he performed a 9-hour schedule. 19 of the respondents start their working days before 8 am, with many starting as early as 4 am. They generally prefer early morning and late-night rides to the airport or other long-distance rides because the incentives are higher during these hours. 16 out of 20 respondents (80 per cent) stated that their daily schedules ended after 10 pm.

It should be noted that these working hours include the breaks taken by the driver-partners. The cab aggregators give driver-partners the freedom to take as many breaks as they wish. On average, the respondents said they break for about two hours a day. Thus, it is evident that a gig worker's average life on these ride-hailing platforms is indeed strenuous. The majority of them work incredibly long shifts to make ends meet.

Meals, Holidays, and Medical Compensation

The respondents stated that the platforms do not provide meals or cover for the driver-partners additional expenditures. The companies do not cover the amount

spent on meals, diesel/petrol, or other miscellaneous costs. These are extra expenses that must be deducted from their regular earnings.

A testament to the 'flexibility' of the gig economy, the platforms do not provide holidays of any kind. The decision to choose the number of working days remains entirely up to the gig worker. National holidays and strikes that would generally apply to other sectors do not apply to the gig economy. During his interview, the X company representative stated that holidays are the busiest year for the gig economy. Most driver-partners interviewed said they take 2-4 days off a month.

The interviews' findings and existing literature reveal that gig workers do not receive any form of medical compensation or other social security benefits.

A response by X company representative - "I don't think that the gig workers have an issue with the functioning of the gig economy. However, along with the gig economy comes a lack of insurance and other social security benefits. Here in India, the fact of the matter is that they are not used to it anyway. The situation is different in Western countries where there is a sense of awareness, probably due to their educational backgrounds, wherein they demand these securities. So if you were to ask me if our driver-partners are missing out on anything, I don't think they are, because they haven't gotten it before, so it's not being taken away from them".

Wages and Incentives

In the gig economy, employees are not paid fixed salaries. Gig workers are not treated as salaried employees but rather as independent contractors paid by the 'gig'. Thus, the driver-partners at X and Y companies have the discretion to decide their earnings by choosing their working conditions.

According to X company representative- "There is no base salary. There are two types of driver-partners, the first are drivers of our leased cars, and the second type are those that have their car or work for a private company".

The interviews findings from the interviews reveal that the gig workers receive payment daily (as is the case with X company), or a weekly (as is the case with Y company) basis. Some respondents stated that they preferred this form of payment because their accounts are credited promptly rather than waiting for monthly wages as in traditional jobs.

The primary driving force attracting individuals to join these platforms are the incentives. When the cab aggregators first came about, the driver-partners had the opportunity to earn up to a lakh a month through incentives. This was seen as revolutionary, causing several individuals to leave their traditional jobs and shift to this market. Although the incentives have been rolled back heavily over the last couple of years, many still consider it a lucrative career option. The incentives provided by the platforms are primarily monetary. They are based on factors such as; the number of rides completed, distance covered, etc. Through surge pricing, there are also higher incentives for rides during the peak hours. Thus, these factors

are taken into consideration by the platforms while providing incentives. Also, incentives are higher for long-distance rides and night shifts.

According to the X company representative- *“All the gig platforms in India started with heavy incentives. The driver partners were happy, as they were earning high amounts. However, over the last couple of years, the companies began bleeding out, so we had to make a tough decision to roll back on incentives. The incentives have now gone down significantly. 2-3 years ago, the driver partners viewed this as a sustainable career path, but now they have to work extremely long hours to make ends meet. Normally you tend to grow upwards in your career, and not the other way around. But I think people need to understand that without these platforms, they wouldn't have a job at all. What makes them stay? - Well, what else can they do? Most of them have started their careers as drivers; where do they go from here? Unfortunately, a significant number of them do not possess additional qualifications, or adequate educational backgrounds, because it will be difficult for them to get out of this field altogether”*.

Factors that Motivated You to Join this form of Employment

(Y company representative) – *“The social group of Y company drivers in India sees themselves grow as independent small business owners. This is driving micro-entrepreneurship within the system. They don't see it as temporary freelance jobs but as full-time livelihoods. This system has brought a formalized structure in the economy by ensuring they get paid a fixed per centage. The driver partners are moving to bigger cities and can better their quality of life and their families. This is evident from the growing popularity of the profession. The driver-partners themselves decide the working hours and breaks. They are running their own business and are equally involved in making them as success as we are. We are just the enablers here”*.

Several pull factors attract individuals to the gig economy. In a developing country like India, individuals working in the gig economy are generally willing to overlook certain negative factors, such as the perceived risks and uncertainties, and focus on the perceived advantages, such as increased flexibility, autonomy, and higher income. Ride-hailing services in the form of taxis or autos are certainly not recent. However, platforms such as X and Y allow drivers to increase their earnings using multiple short rides. This is one of the distinguishing features of the platforms.

According to Babu (31) (name changed), a driver-partner of Y company, *“We are in a partnership with Y. We get good work. If I worked as a driver in a private company and got a 20 km away job, the drive back would be empty. But Y company allows for short trips. In this way, I can save on diesel. Through the weekly payment system, I can maintain my car better than I could have if I were working for a private company, so over all, I think this is a more profitable business”*.

Similarly, Lokesh (29) (name changed), another driver partner of Y, states, *“I work as a private company driver as well. I think working for Y is better during*

peak hours because they have surging prices, so you can make more profits compared to when you work as a driver in a private company”.

Most respondents stated that the primary reason to join this form of work was the potential to earn a higher income. Although they have taken a massive dip over the last couple of years, gig workers remain in this form of work. Some of them continue to stay because they are satisfied with the earnings, while others lack viable alternatives. Other respondents stated that flexibility was one of the primary motivators for joining this form of work. Apart from this, some respondents said their motivation was that they had a vehicle of their own, so they believed this work would be profitable. Some stated that they chose this profession as there are no viable alternatives. In India, the unemployment scenario is quite abysmal. Every year, almost four million individuals join the existing workforce. Thus, gig platforms play a crucial role in providing employment.

Challenges Associated with Gig Work

(X company Representative) “I don’t think they have an issue with the gig economy. However, along with the gig economy comes a lack of insurance and other social security benefits. But, here in India, they are not used to it anyway. So, if you were to ask me if they are missing out on anything? I don’t think they are because they haven’t gotten it before, it’s not being taken away from them. Their main issue is the reduction of incentives, not the functioning of the gig economy. All the gig platforms in India started with heavy incentives. The drivers were happy; they were earning high amounts. But the companies began bleeding out, so we had to roll back the incentives. The driver-partners have complained about it, and it is a fair argument; their frustrations are understandable. But it is a tough balance at the end of the day”.

The Paradox of Flexibility in Gig Work

The chief characteristic of gig work is the perceived benefit of ‘flexibility’. However, in several situations, this flexibility does not make the lives of gig workers easier but adds to the risk of their work and uncertainty.

Rajesh (name changed) (23), a driver-partner of Y, states- “I would like to have fixed timings and a routine, but I have not been able to find that type of work. In my opinion, fixed timings are better because I get to return home and leave regularly. With this type of work, the income is good, but there is uncertainty. Every day I sleep in a different location while taking breaks, wherever I can find shade. This is not something I would like to continue with.”

Lack of Protection for Gig Workers

The Gig Economy remains mostly unregulated. Thus, gig workers lack a sense of protection or safety net generally available to employees in a traditional setup. While gig platforms strive to ensure maximum customer satisfaction, the gig

workers' woes often go unnoticed. In the interview, the respondents were asked to share experiences highlighting certain challenging or negative aspects of their work.

Sarvesh (name changed), (37) a driver-partner of Y, states- *"I would not say I am against the rating mechanism; however, sometimes it is very arbitrary. For example, if a customer wants to smoke in the car and I do not permit it, I am immediately given a negative rating. This reduces my incentives."* Similarly, Sriram (name changed), (40) a driver-partner of both X and Y, states- *"The company does not care for the drivers; it only values its customers. Sometimes we get delayed due to traffic conditions. It is out of our control, but we still get negative ratings, and there is nothing we can do"*.

One of the prominent and novel characteristics of gig platforms is the 'Rating' feature. It allows the gig workers to be directly answerable to the consumer and thus does away with certain 'employer-employee' dynamics. Although most respondents expressed that they liked the rating feature, some expressed concerns about it being too arbitrary.

Regarding driver safety, Ramprasad (29), a driver-partner of X, said, *"All the details of the drivers are taken for safety measures. But what about the customers? Sometimes, they take advantage of the drivers, especially drunk ones. No details of the customers are asked apart from the mobile number, and the drivers continue to be blamed for everything"*.

According to the X Representative- *"There are many ways that the driver-partners can break the contract or get suspended. When we receive a complaint, the first thing we do is suspend the driver. At this stage, it does not matter if the driver-partner was really at fault, but this is the protocol we follow. Following this, an investigation is conducted, and we take a call on the next step. The driver partners don't like it; they are always persecuted. If anything goes wrong, they are always at fault. I can understand their frustrations. However, our priority is to ensure the safety of the customer."*

The Mental Strain of Gig Work

Along with autonomy and flexibility, gig work also comes with high risks and uncertainty. The proponents of gig work have mainly overlooked the mental strain of working under such extreme conditions. Several respondents stated that this work could not be considered a sustainable career choice because of the uncertainty that comes with the nature of the work. The long working hours and the conditions under which gig workers are made to work are mentally taxing. In a city like Bangalore, driving in traffic conditions for over twelve hours a day can cause high mental strain and frustration. These are aspects that often go unnoticed.

(X Representative) stated – *"The mental strain of the drivers is a big concern for us. Driving in cities like Bangalore, with traffic conditions, is highly irritating. Mentally, they become frustrated, and this could lead to other issues. We try to address this by providing counselling sessions for the driver-partners, but this is not as effective as we would want it to be."*

Summary of Findings

Some of the chief characteristics of gig work are flexibility and autonomy. Gig workers are free to choose the type of work they wish to take up, the time and place factors, the amount of work they undertake, and how they complete tasks. A testament to the flexibility of gig work, there is generally no fixed salary that employees pay to the workers. They are paid as independent contractors for each 'gig' undertaken.

Although the perceived benefits of the level of flexibility and autonomy are high, it is not an entirely rosy picture. Unlike traditional employees, one of the most controversial aspects of gig work is that companies do not provide any social security benefits to gig workers. The lack of financial stability and security is one of the main concerns of the gig worker. Another inference from the interviews was the paradox of 'flexibility' provided by gig work. With over 50 per cent of those interviewed stating that they work 16 hours or more daily (including breaks), it is evident that a gig worker's average life in these ride-hailing platforms is indeed strenuous. The majority of them work incredibly long shifts to make ends meet. The proponents of gig work appear to have overlooked the mental strain of working under such extreme conditions. Several respondents stated that this form of work could not be considered a sustainable career choice because of the uncertainty.

Lastly, regulating the gig economy remains a hotly debated issue in the academic world. The free market forces of supply and demand primarily run the gig economy. While proponents of gig work argue that this will lead to sustained growth, critics think that a complete lack of regulation could lead to the potential exploitation of gig workers.

VI Conclusion

The gig economy is a rapidly growing phenomenon. It has dramatically changed employment patterns worldwide, with an increasing number of people choosing to do away with traditional forms of work and become 'micro-entrepreneurs'. It is a phenomenon that affects so many individuals' lives and has wide-reaching impacts on the economy. Therefore, the government must take specific initiatives to create a conducive environment wherein all the economic stakeholders can thrive.

Gig workers are entitled to the best of both worlds- flexibility and benefits. As expressed by the Uber CEO (Mr. Dara Khosrowshahi), the current system is binary. When a company provides additional benefits to independent contractors, they become less independent. Similar concerns were echoed regarding the Indian Social Security Code 2020 formulated by the Central Government. The social fund proposed by the Code could reduce the earnings of platform workers. The cost of other social security benefits will reduce in-hand income and could also lead to selective hiring. A proposal put forward by Mr. Khosrowshahi is the establishment

of benefit funds that give workers the cash they can use for the benefits they need like health insurance or paid time off (The New York Times, 11th August, 2020). Independent workers in any state that passes the law could take money out of every hour of work they put in. All gig platforms would also be required to contribute towards the funds. The proposal is initially meant for California and hopes to be implemented across countries.

Taking this one step further, another potential solution could include platform users' contributions. This would be a set-up wherein the welfare costs are defrayed among the platforms, government, and customers. Platform users would be liable to pay a small amount in the form of welfare payments at the end of every ride. This, along with contributions from the government as well as gig platforms in a single pool, could eventually form a social fund for the benefit of gig workers. Nonetheless, this would have to be implemented transparently with norms in place, not to be misused by the companies.

The fund can be used to provide welfare to gig workers in the form of health insurance and other long-term benefits. The need of the hour would be to tread a middle path that accounts for the security of gig workers whilst allowing gig platforms to flourish and provide employment opportunities.

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Widowhood and Women Farmers: Structural Inequalities and Negotiation Strategies

Anurekha Chari Wagh

The paper examines the negotiation strategies adopted by widows (women whose farmer husbands have committed suicides) in Wardha district, Maharashtra, India¹. Agrarian crisis manifested in 'suicides of farmers', has rendered 'widow farmers' into 'vulnerable within the vulnerable' category, thereby placing them at high risk. The paper drawing from global south literature argues that the widow farmers develop negotiation strategies to deal with the structural inequalities as a result of agrarian distress. What then is the nature of the distress? One, it occurs at the level of everyday practices of livelihood, where the widow farmers deal with non-viable agrarian conditions, by developing short and long terms coping mechanisms to deal with the crises under extreme economic hardships. Two, the widow farmers constantly devise strategies to deal with her identity of a 'single widow mother/worker' using the 'legitimized patriarchal codes' of accepted behaviour, in a highly entrenched patriarchal agrarian structure, that perceives the state of widowhood as 'stigmatised' and that of 'single women' as exposed and abandoned and thus need to be regulated. Through the analysis of the coping mechanisms and negotiation strategies the paper establishes that the widow farmers constantly engage with the structural inequalities of economy and challenges of identity, by using the 'patriarchal codes' available to them. In this process the women not only accept and adhere but also question and confront patriarchy; thereby reinforcing and reconfiguring patriarchy simultaneously. The paper concludes by stating that widow farmers constantly push the boundaries and negotiate for their 'spaces'.

Key Words: Agrarian distress, Widowhood, Stigma, Coping, Negotiation, Space

Introduction

The paper is based on the research which explores the everyday lives of 'rural widow farmers' in Wardha district of Maharashtra, India, to examine the complexity of agrarian distress, coping mechanisms and negotiation strategies used by widow farmers². It links the macro structures of inequality, (which are the result of market driven policies and programmes of the state) to the micro

Anurekha Chari Wagh, Associate Professor, Department of Sociology, School of Social Sciences, University of Hyderabad, Hyderabad 500046, Telangana, Email: anurekha@uohyd.ac.in

level everyday realities of the widow farmers. In doing so, the paper bridges the gap present in literature on women/widow farmers by integrating their livelihood struggles to the strategies they develop to deal with their 'self and personal identity' in everyday negotiations within embedded structural inequalities. The paper highlights how women make use of 'legitimized patriarchal codes' to negotiate while located as excluded citizens within new forms of structural inequalities.

To gather data on the structures of marginalities and the specific processes of coping and negotiations—the research team³, conducted fieldwork in Wardha, Maharashtra. Multiple primary research methods included a household survey, and discussions and interviews with government and non-governmental organizations, trusts and foundations working in that district. For secondary analysis, we focused on policy research to get information on the issue. Based on purposive sampling we initially visited the families recorded in the government records as 'families where farmers had committed suicide' and then through conversations with the women, villagers and community leaders, got information about other cases of suicide by farmers not registered in the records. The research team visited 120 villages over eight talukas (administrative divisions), based on which we observed that many cases registered as suicide were bogus and many genuine cases were not registered. Thus along with government data, we added data of suicides collected by Non-Governmental Organizations (NGOs) and other organizations, correlated and matched these with government data and started identifying families where there were widow farmers. After identifying 146 families, we initially conducted preliminary interviews and discussions with widows of the farmers who committed suicide, as well as other relatives, family members, neighbors and community leaders. It is important to note that the caste composition of the families included Maratha-Kunbi, an upper caste group, predominantly agriculturists and scheduled castes. On the basis of this, we identified thirty-five women, with whom we conducted in-depth interviews. The age group of women varied from 35 years to 55 years; they had children and were married for a minimum of 10 years. Insights from these interviews formed the core of the analysis presented and examined in this paper. The paper initially analyses the nature of agrarian distress, farmers' suicides and women farmers' marginality. Further it focuses on the negotiation strategies used by widow farmers to negotiate their 'self' and her 'space' within a social structure limited by patriarchal structures intersected by gender, caste, class and region.

I Agrarian Distress, Farmers Suicide and Women Farmers Marginality

Here it is important to ask two questions: one how do we make sense of the agrarian distress in India and Maharashtra in particular? Two, how severe is this agrarian distress and what does farmers' suicide imply for the women farmers?

The data from the People's Archive of Rural India states that a total number of 2,96,438 farmers have committed suicide in India since 1995 and in 2013, when we started the research the number was at least 3,146. What about Maharashtra? The figures are not very encouraging. The total number of farmers who committed suicide in Maharashtra is 60,750 since 1995 (National Crime Records Bureau, 2014). Recently the data reflected that Maharashtra recorded 5036 farmer's suicides in two years (2020 and 2021), with over 50 percent deaths coming from the State's Vidarbha region (Deshpande 2022, *The Hindu*). These are extremely shocking statistics that reveal the larger malaise affecting agriculture in India.

Scholars have argued that the agrarian economy of India is in a state of stagnation, defined by fall in productivity for almost all crops from mid 1990s. In a situation where the value of output from agriculture is steadily decreasing, it is a matter of concern that a large section of population is dependent on agriculture as their primary source of income. We need to recognize that approximately 64 percent are either dependent on agriculture or are self-employed, in conditions where there is limited rural non-farm employment (Mishra 2007). The situation is rendered complex in conditions where the majority of farmers in India are small and marginal, holding fragmented pieces of land, thereby rendering agriculture as a non-viable livelihood choice.

In this context it becomes necessary to understand why agriculture, which was such a critical sector within Indian economy, faced such crisis situations. Scholars such as Vasavi (1994, 1999), Jodhka (2006), Jha (2003), Gupta (2005), Krishnraj (2006) and Sainath (2004, 2005) contextualize the distress agrarian conditions to the shift in the priorities of the Indian nation state in the decades of the 1980s and 1990s. Given the fact that a majority of Indian population depended on agriculture, it was defined as the primary sector during the initial decades of post independent India. Unfortunately, though the rhetoric was pro-poor, the policy environment was characterized by adhoc, populist and symbolic gestures that did nothing to change the inequalities embedded within the agrarian economy. Failure of the land reforms programme in the 1970s and 1980s and the success of green revolution 1980s fundamentally changed the way agriculture was practiced. The core of green revolution based on increased productivity through use of high yield variety of seeds led to a phase of commercialization of agriculture, which was clearly unsustainable (Vasavi 1994). Such an agrarian policy paved the way for the steady and rapid decline of Indian agriculture, in the 1990s defined by stagnancy in production, deteriorating soil conditions and of farmers engaging in high capital single cash crop, based on short term gain at the cost of long term viability. The landholdings are so fragmented that there is little scope for agriculture regeneration (Gupta 2005). The arguments put forth could be summarized as that, the stagnancy and decline of agriculture conditions in India was accelerated by the liberalization and globalization policies of the 1990s, which left the vulnerable farmer handling stagnant agrarian economy to

deal with the logic of free market, leading to disastrous results such as suicides by indebted farmers (Jodhka 2005).

Analysis of the farmers' suicides in Maharashtra also speaks of the how the commercialization of agriculture pushing farmers to engage in a competitive based high capital intensive exercise in an unregulated market renders them highly vulnerable and at extreme risk. Scholars analyzing incidences of farmers' suicides in Maharashtra argue that it is a combination of factors. In Maharashtra suicide of farmers is particularly acute in the cotton growing districts of Vidharba region, where Wardha is located. Why is this? Studies have shown that farmers are engaging in high risk agriculture when they grow cotton. Growing cotton requires high capital investment and infrastructure which pressurizes the farmers. The poor irrigation systems, inferior quality of cotton, growing cost of inputs such as seeds, fertilizers, technology, tools, lack of accessible formal credit structure⁴, increased dependence on informal private money lenders, lack of cotton lobby to push for their cause and no growth of cotton based industries in the region has led to this situation, where the farmer is caught in the vicious circle of non-viable capital intensive free market regulated agriculture; that they were committing suicide to escape the drudgery and increasing indebtedness seems to be the only 'viable' option (Sainath 2004, 2005; Mishra 2006, Deshpande, *et. al.* 2005, Mohanty 2001, 2005 and Mohanty and Shroff 2004). What about Wardha district? A combination of factors such as lack of crop diversification, farm fragmentation, lack of continuous electricity, lack of non-farm employment and industries linked to agriculture produce, following high investment and low returns crops accelerated the agrarian crisis affecting Wardha. Thus the district is an example of how the agrarian policy in India has pushed a market based agriculture venture that forces the farmers to compete in an unregulated market thereby putting them in positions of high risk (Chari Wagh 2020).

Rural distress, the out migration of men and farmers' suicide has pushed women into agriculture without any means of control. Despite the fact that one does not have strong statistical evidence due to the faulty definitions adopted to classify women workers in agriculture as non-workers, the work of women is majorly underestimated (Hirway 2002). Women today are the core to agrarian economy, and form predominantly the rural subsidiary and casual workers. It increases the work burden of women without a commanding position in agriculture as cultivators and increased wages on par with men. The face of the farmer in India is female, thereby emphasizing the centrality of women's work in agriculture, their heavy work burdens and unequal returns to their labour (Krishnaraj and Shah 2004). Vepa (2009) argues that whenever agricultural distress hits any region, the first victim is the women; increased work burden, debt- repayment burden, reduced household consumption and less spending on health care. Agriculture in this era of globalization is undergoing a number of changes and most of it impacts women who are sole principal earners of their households, especially widows left behind, surviving the farmers' suicides who

face a daunting task (Krishnaraj 2005). There have been very few studies that have focused on the widow farmer dealing with such extreme conditions. Important among them, is the research by Padhi which emphasizes on the innumerable hurdles faced by women surviving farmer suicides in Punjab, India; highlights how the women have to take care of their family without the support of the 'man' and under constant control of her husband's kin; a state of 'pauperization' despite 'owning land' (2009).

In the case of Wardha, the widow farmers are placed differently. Most of the widow farmers who were part of the study owned, controlled and had access to small pieces of land approximately 2 to 5 acres. Here it is important to understand that though the women were 'widow farmers', regional differences played an important role in structuring the coping and negotiations strategies. Thus it is a matter of concern that structural inequalities due to fragile agrarian conditions are so deeply entrenched that even access and control of 'land' by women farmers, does not provide them with support to deal with poverty and extreme hardships. Scholars argue that there is no proof that land ownership reduces poverty given that land is fragmented and agriculture is non-viable (Rao 2005, Krishnaraj 2005). The following paragraphs highlight the complexity of the strategy of negotiation, then goes on to explain the coping mechanisms used by widows to ensure economic security amidst scarcity and three of the negotiations that are used to develop a self-identity, that would ensure respect and self-esteem in the society.

II Coping Mechanisms, Negotiation Strategies and 'Self Identity'

Negotiation refers to the process of how women bargain to access the resources, spaces and assets not generally available to them. Negotiation refers to the strategic use of the 'codes' as a tactical move to access 'spaces, respect and freedom' to lead their life with self-esteem and pride. How do negotiations take place? Drawing from Hartmann (1976) and Gearson and Peiss (1985), one can state that 'negotiation' describes how women bargain for privileges and resources. The process is also based on 'accepted patriarchal values' but provides a multi-dimensional perspective as women make conscious decisions to adhere, push, certain patriarchal practices so as to create 'spaces'. Such a perspective perceives women as active agents and not 'passive victims'. The resources available to women are generally patriarchal codes, to negotiate with men, state and community to access to privileges and opportunities. For example, the responsibilities for kin and domestic work not only gives them respect and obligations but also power and prerogatives (Gearson and Peiss 1985). According to Hartmann (1976) women's subordination is reiterated by a combination of ideology and material circumstances. In the context of fewer resources and lack of power, women have lesser resources to negotiate and many a times accept the limitations of patriarchy to derive advantages and 'shift boundaries'. It is clear that for women to access the resources and create their

own spaces they have to comply and use patriarchal structures, while doing so it steadily shifts patriarchy, but does not dislodge them, and in some cases reinforces patriarchy. So it is a continuous process of negotiations, where the extreme economic and social vulnerability severely curtails the process of challenging patriarchy but helps in shifting the boundaries and recreating newer boundaries.

Literature on widowhood in India, emphasize the fact that widows are stigmatized, vulnerable and experience the feeling of abandonment (Chen and Dreze 1995, Chen 1988, Chakravarthi 1993, Majumdar and Adur 2012). Patriarchies in India structured in terms of class, caste and religion, controls women through the institution of marriage, giving her identity, status and security and thus once she is widowed, the position becomes extremely vulnerable. Widowhood limits woman's individual rights and makes them experience high levels of deprivation. The sources of vulnerability includes the institutionalization of Patrilocality (where after marriage women is 'transferred' to the home of her husband, thereby curtailing her economic and cultural rights in her maternal home), Patrilineal inheritance, limited remarriage practices (probability of young childless widow getting remarried is high, but that of middle aged widowed mothers very low), employment restrictions (single mother with many responsibilities and not enough market demand skills set), social isolation (very much exposed to malicious rumors regarding her as 'sexually available, promiscuous, strong dress code, perception of being inauspicious, unlucky bringing bad luck, thus face social ostracism) and high possibility of experiencing physical violence (Chen and Dreze 1995, Chen 1998). Thus widows are 'physically alive but socially dead', their identity structured around the principle of denying her independent sexuality as well as her personhood (Chakravarthi 1995). Given this perception, widows have to carefully traverse the intertwining structures of economic, social and cultural inequality. Such vulnerability increases greatly when it comes to 'widow farmers' where the economic, social and cultural inequality multiplies. How does one ensure compliance and acceptance from women? Chakravarthi (1993) argues that women's compliance and acceptance gets institutionalized through the dual processes of coercion and consent. Coercion is exercised by her family, the state and religious authorities, where 'transgressing' women who cross the set boundaries get punished, more often through violent means. The ideology of consent, on the other hand operates on the principles of self-regulation, where women regulate themselves by adhering to the patriarchal codes of behavior proscribed for them. These are socialized through religion, family and caste, thereby creating an ideological hegemony of consent. In this context, the purity of women is ensured by strictly channelizing women's sexuality into the 'acceptable institutions of marriage and motherhood'; wherein caste purity is maintained and patrilineal succession is ensured. Such an ideology thus makes the 'widow' stand exposed as she does not have her 'husband and state of marriage' to give her status and dignity. Women constantly negotiate spaces

through the use of 'patriarchal legitimized codes' of behavior (Ranade 2007). In such a context, the available resource for the widow farmers are 'legitimized patriarchal codes', which they use to negotiate the extremely unequal terrains, carving some degree of 'spaces', while subjecting themselves to greater control ideologically.

Within this larger structural and ideological context the coping mechanisms are framed around the extreme intersecting marginalities experienced by the widow farmers. Multiple responsibilities include dealing and paying of numerous debts (not waived off by the government), taking care of non-viable agriculture, demands of the household in terms of food, clothing, health and other incidental expenses, specific education needs of children (special classes for school children and/or tuition fees for professional courses for young adults), health needs of ageing parents/in-laws/self are shouldered by the widow within extreme economic hardship as discussed earlier. Such precarious situations pressurize them to strategize and prioritize the most immediate needs and thereby balancing and coping continuously.

It is important to realize that the widow farmers in Wardha district have been recipient of a number of relief programmes designed specifically for the widows of farmers who committed suicide. The government of Maharashtra has waived off a number of outstanding loans, women are receiving a number of schemes designed for poor widows and most importantly have access, ownership and control over agricultural land. But the non- viability of agriculture as sustaining livelihood has rendered these women extremely marginal, despite having control and access to assets such as agricultural land and receiving relief measures from the government. So the question is why these women face marginality despite having legal rights and ownership of crucial assets. The answer lies in the 'politics of the inclusion process'; where structural inequality renders the 'inclusion process', of widow farmers through access and control over agricultural land, as fragmentary and disconnected pushing them into devising coping mechanisms to meet the household livelihood needs (Chari Wagh 2020). Coping mechanisms to ensure livelihood security adopted include three measures, one, engaging in multiple paid work, two austerities by reduction in daily needs and three investing in children's education to create a livelihood that does not depend on agriculture (Chari Wagh 2020).

Further to build a strong selfhood for themselves, widow farmers use 'symbolism of motherhood' not only to carve out legitimate space, within highly unequal public space but successfully subvert the 'stigma' attached to the notion of widowhood. Thapan (1995) in her analysis of images of body and sexuality, argues that women's experience of everyday life is very closely interlinked with the perceptions of their bodies and sexuality seen in relation to an 'ideal accepted femininity'. In this context, the women's body is socially constructed and therefore under the constant gaze of the 'other'. It is through defining herself within the accepted notions of the dominant other, that the women shape their 'self- identity'. As Giddens (1991) argues, 'self-identity' is not 'given' but

something that has to be routinely created and sustained in the reflexive activities of the individual. The strategies used by widow farmers included; one, erasing their identity as 'single free widow woman' and converting it to that of an 'invisible worker' working hard for her children and family'. Two, by subverting the 'stigma' associated with a 'widow' not bound by sanctity of marriage institution into a 'self- sacrificing mother', who struggles against all odds to build a future for her children, family and broadly the Indian nation.

Widow farmers navigated the 'public spaces' by donning a cloak of invisibility, thereby rendering themselves anonymous and invisible. Observations in the field revealed that the widow farmers consciously avoided doing anything that drew attention to themselves. They rarely invested their already meagre resources in beautifying/ grooming themselves, believing that it would draw unnecessary attention to them. Married women by the death of husband, cease to be a social entity (Chakravarthi 1995). Widow farmers shared that the only 'respectable' way to lead their life is to work continuously for their family and be careful not to draw any unwarranted attention towards them; thus to be as 'invisible' as possible.

The strategy of invisibility is used because now as single women, who have to negotiate public spaces carefully, traditionally associated as 'male space' as how they are perceived. Chakravarthi (1995) argues that the community's perception towards widow/single women is that of 'moral panic', as after losing her husband, the sexuality of the widow cannot be 'held' in control, and so it is extremely necessary that she becomes unsexed. Through ceremonies after the death of husband that completely erases her 'identity' (regulation of dress, ceremonies that she could attend, jewellery that she could wear, occasions that she could attend and many more) and constant surveillance of the family, community, the 'patriarchal gaze' leads to the 'sexual death' of the widow (Chakravarthi 1995, Chen and Dreze 1999).

Widow farmers have been harassed by men on the streets, who stare at them, pass sexually loaded remarks and dare them to look at them. The strategy used is to go in groups, ignore the comments, put their head down, show that they are engrossed in work and 'dress down', trying very hard not to draw attention to themselves by becoming 'invisible'. Phadke (2007) argues that space is gendered and that women who negotiate public spaces do so by 'manufacturing respectability'. This demonstrates that they inhabit the public space because they have the legitimate right to be there and are not 'loitering around'. Using the imagery of 'respectability' the widow farmers, rationalize and justify their inhabiting public spaces under the garb of 'work', rendering themselves invisible. This strategy helps to erase their identity as 'women', but as 'asexual mother working for their family'. As one of them shared '*ha samaaj jagu det nahi ani maru det nahi*' (*this society neither let us live nor allows us to die peacefully*). Widow's reputations are closely linked to whether they are able to demonstrate on a regular basis their conformity to patriarchal social norms. As different bodies experience 'space' differently, depending upon gender, age,

status, class, sexuality, religion, physical ability, caste, the women discipline their 'body and the image that it represents' (Ranade 2007). Widow farmers in Wardha district try very hard to project an image of a 'respectable single mother' working hard to secure the livelihood of her family, where the ideal of a 'visible good mother and invisible 'sexual self' helps her to negotiate hierarchies of access to gendered public spaces.

Another crucial negotiation strategy used by the widow farmers is to subvert the notion of 'stigma' associated with 'widowhood', within the largely patriarchal society in India and create for herself a 'respectable ideal' to be found in the imagery of 'mother India'. One understands that all categories of women do not experience widowhood similarly and so stigma is not to be understood as a universal category experienced by widows cutting across caste, class and region. Despite the various distinctions one important similarity is the state of 'inauspiciousness'. Why stigma? Widowhood in India has to be analysed within the ideological significance of 'auspiciousness' (lucky, blessed) associated to the state of 'being married'. The ideology of Brahmanical patriarchy had given the onus of maintaining the health and long life of the husband to the wife. It was understood and accepted that a 'good, chaste, virtuous wife' through following her duty, that is 'pativrata' can ensure long life of her husband and fight death on his behalf. In cases that the husband dies before the wife, it stigmatizes the 'wife' as she was not virtuous, good and chaste enough to save her husband from death. The widows by subverting the stigma of widowhood into that of a 'self sacrificing mother', who stays on, works hard to take care of her 'fatherless children', builds 'respectability'. 'Motherhood' becomes an accepted symbol countering 'widowhood', where she uses the patriarchal symbols and identity of 'status and responsibility' as that of a good mother, to help her negotiate 'spaces'. Why motherhood? Globally motherhood is institutionalized in such a manner that it provides a social identity to large sections of women with a strong enough sense of self-worth from which it becomes possible to challenge various forms of oppression and in the process, develop new strengths and capabilities (Walker 1995). Further, within India, the institutional and ideological importance of motherhood (but only within the institutions of marriage), where bearing and rearing of children (especially male child) is central to women's power and well-being (Dube 1986, Uberoi 1993, Reissman 2000).

Widows very consciously build their image around the 'super women syndrome' and argued that they were 'Mothers of India', who struggled against all odds, tribulations and hardships for the sake of their family and children. What does the symbolism of 'Mother India', refer to? As an ideology, immortalized by the epic movie 'Mother India' (directed by Mehboob Khan in 1957), highlights the strength of 'mothers of India', who despite having no resources, no support, through sheer hard work, strong will power, survive and can endure at extreme margins for the sake of building a better future for their children specifically and the community and nation at large. Schulze (2002) based on her analysis of 'Mother India' argues that it was based on ideological

construction of 'motherhood', having an embryonic link of the mother to land onto the soil and the nation at large. This iconic mother through her struggles, endurance and emotional strength, can create a better future for her children and nation at large. Thus the idea of 'Mother India' is not based on the idea of liberating oneself as a human being, but uphold the existing social order that suppresses 'self' by supporting its ideology and public morality of self-sacrifice and fortitude of the 'mothers' of the nation.

The negotiation takes place into ways: on the one hand, the widow farmers demand for a special 'cultural' recognition that they faced the extreme conditions of agrarian distress, by sticking around and handling, intense economic marginalities, whereas their husbands committed suicide, as they were weak and could not handle tough times and left the family vulnerable and alone to face the tough times. Widow farmers blamed the ineffective and disastrous agricultural policies of the state and argued that as 'men were strong physically but weak emotionally' they could not handle these distressing conditions. They use the symbolism of 'Mother India' to effectively to negotiate their position within society, their stigmatized identity of a 'widow' was erased under the dominant identity of a mother and worker, who fights against all obstacles and impediments for the larger good of their family. Thus the imagery invoked and used as a negotiation strategy by the widow farmers generally revolved around the image of strength, fortitude, steadfastness, loyal, resolute and strong, which is what the neoliberal discourses on 'enduring capacity and efficiency of women under distressing conditions' is based on.

Justification and acceptance of the 'Mother India' symbolism was also based on the way the widow farmers presented their husbands. It is important to recognize that such imagery is not contrasted with the image of an 'insensitive husband and irresponsible father' who did not think twice before committing suicide, but that of how women are strong but men are weak emotionally. Widows presented their husbands as 'good' and 'kind', and that they miss the 'sense of security and protection', that 'his' presence had given the family. Widows regretted that their men did not share their economic fragility and the extent of indebtedness so that they could have helped him. The suicides have left many women defenseless and powerless. Widow farmers share that many women (friends/relatives/village) do not question their husbands regarding economic transactions as they fear that they would commit suicide. Their greatest regret is that their children had to put their childhood on hold and become responsible for household duties early in their life.

Conclusion

In conclusion one could state that the widow farmers through using multiple coping and negotiation strategies based on 'legitimate patriarchal codes', constantly push and draw/re-draw patriarchal structures, changing and reconfiguring it but not completely dislodging and displacing it. It is important to

understand that institutionalized gender inequality denies the possibility to women, and particularly to marginal women like the widow farmers who are embedded within highly disparate structures to traverse the inequality autonomously. Women thus have to strategically use the 'legitimized patriarchal codes', thereby initiating a process that simultaneously dislodges and paradoxically reinforces patriarchal structures in complex intersecting ways.

Endnotes

1. This paper is based on a UGC Major Research Project (2012-2016). Some aspect of this study is published as a chapter titled: Gendered Rights, Politics of Inclusion and Negotiating Power Structures: Widow farmers in Wardha District, Maharashtra in Shalini Suryanarayan, *et. al.* (Eds.) (2020) *Thinking Gender: Socio Cultural Perspectives*. Concept Publication: New Delhi.
2. The author acknowledges the time shared by the farmers and thank them for the insights as part of the research. I also wish to acknowledge my thanks to the anonymous reviewer for their comments. The lapses in the paper are entirely mine.
3. The research team included Project Fellows, Tejashree Kamble and Research Assistants Santosh Chandane, Poulomi Ghosh, Chandrakant Kait, Satish Bhalerao and Bhargavi Ghosh.
4. Shah (2007) states that the new policy regime of the liberalized government regarding financial sector reform has grossly neglected the rural credit delivery system. The Rural Financial Institutions (RFIs) in Maharashtra have shown not only slower growth in their loan advances but also poor performance since 1991. So true to the neoliberal policies formal institutions are declining and the state pushes credit delivery systems such as microcredit groups to play an important role in dealing with the rural credit demands.

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The Gap between Increasing Life Expectancy and Healthy Life Years with Reference to Selected Indian States

P. Devi Priya

The Disability Adjusted Life Years Index is recommended by the National Health Policy 2017 to quantify the probable healthy years a person is expected to live. Since independence, the crude death rate in India has declined considerably, and life expectancy has almost doubled. In the state wise analysis, Kerala and Tamil Nadu have the lowest birth and infant mortality rates, while Madhya Pradesh and Uttar Pradesh were among the top three. The paper attempts to analyse whether the mortality improving states enjoy the extra life years gained in good health status.

Key Words: Life expectancy, Disability adjusted life years, Morbidity, Restricted activity

I Introduction

The goal of all health care systems is to attain good health status of the population. Increasing Life Expectancy (LE), decreasing death rates and disaster management in times of outbreak of new epidemics are indicators of health outcome. In 1951, the Crude Death rate in India was 25.1 (MOHFW 2015). In 2018 it fell to 6.2. Life expectancy at birth in India was 37.1 and 36.1 years respectively for males and females in 1951. It increased to 68.2 and 70.7 years in 2014-2018 for males and females respectively. The record of declining mortality and increasing expectation of life years since independence were successes in terms of human resource development. However, the potential increase in life years is optimal only when the enhancement in LE is backed by a healthy life, which results in the true attainment of health status. As one of its quantitative goals, the National Health Policy 2017 has recommended assessing the health status by ascertaining a regular follow-up of the Disability Adjusted Life Years (DALY), a measure of burden of disease and its major categories and trends by 2022. DALY is an index that shows the expected healthy years in the expected lifespan of an individual. The pioneer study on Disability Free Life Expectancy in India was based on the methodology of Sullivan (1971). It used the National Sample Survey 60th round, 2004 data for analysis and concluded that states which had registered high LE had a higher rate

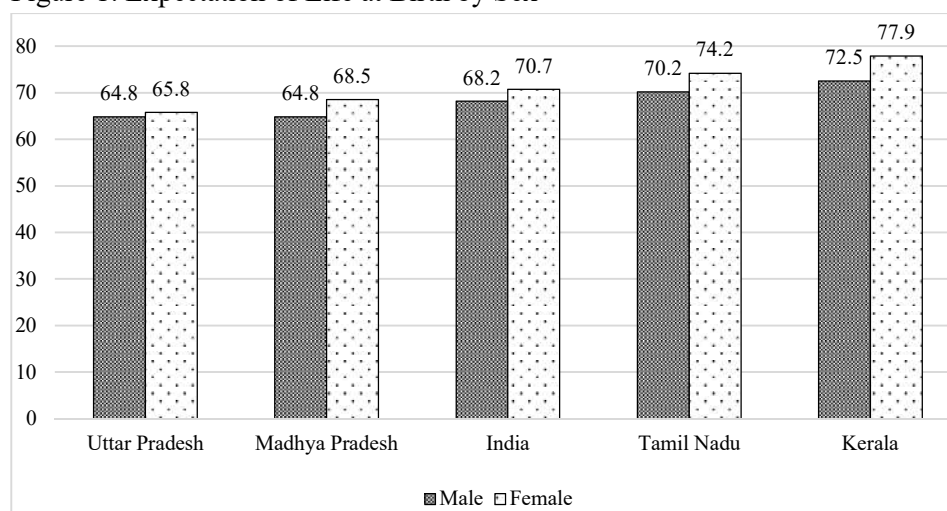
of decline in Disability Free Life Expectancy due to chronic diseases (Benson, *et. al.* 2014).

Statement of the Problem

A comparison between 20 major states in India with the data from the Sample Registration System Bulletin 2020 indicates that Kerala and Tamil Nadu had the lowest birth rate and infant mortality rate, while Madhya Pradesh and Uttar Pradesh were in the top three. However, all four states had death rates higher than the national average.

The abridged life table for 2014-2018 portrayed in Figure 1 reveals that the expected life years in Uttar Pradesh and Madhya Pradesh were below national status, whereas Kerala and Tamil Nadu lead in the parameters, indicating a good sign of advancement.

Figure 1: Expectation of Life at Birth by Sex



Source: SRS based Life Table 2014-2018, p. 6.

Two high-performing and two low-performing states in terms of health were considered for the study. Kerala, Tamil Nadu, Madhya Pradesh and Uttar Pradesh were the four states selected for a comparative analysis. The better-achieving states in terms of public health services were Tamil Nadu and Kerala. Madhya Pradesh and Uttar Pradesh registered high birth and death rates much above the national average. They were the two low-performing states selected.

The paper attempts to analyse whether the mortality improving states enjoy the extra life years gained in good health status and also the status of states lagging behind. The disaggregated analysis was examined with the demographic tool's life expectancy and health-adjusted life expectancy.

Objectives

The specific goal was to investigate the disparities in population health status in the four selected states: Kerala, Tamil Nadu, Madhya Pradesh and Uttar Pradesh, combining mortality (2009-2013) and morbidity (2014) by region and sex.

Methodology

Unit-wise data from National Sample Survey 71st round 2014 was used to estimate the morbidity at birth and at 60 years in the selected four states. A five-year average of Age Specific Death Rates (ASDR) from 2009-2013 was used to generate abridged life tables. ASDR was consolidated from the statistical reports of Sample Registration System for the respective years. The disability adjusted life years (DALY) was obtained by subtracting expected life years without ailment and the years lived with ailments (Benson, *et. al.* 2014).

The two levels of ailment considered for construction of DALY were

- a. Proportion of ailing persons (Morbidity)
- b. Proportion of people with restricted activity (RA)

Morbidity: The proportion of ailing persons included chronic ailments and other ailments perceived, which were both treated and untreated. In the computation of morbidity rates, they were considered mutually exclusive for an individual. The perceived illnesses were partially likely to be biased since they were not from medical records, but the other measure Restricted Activity corresponding to the actual disability suffered.

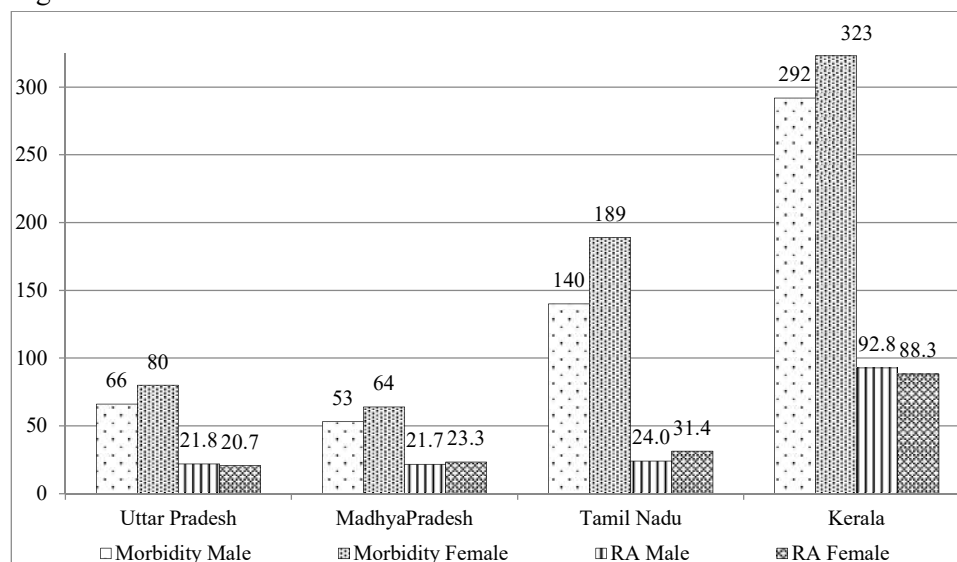
Restricted Activity: RA refers to the inability of a person to carry out any part of his normal activities on account of his ailment. Only that which occurs due to the ailment was considered. For economically employed persons, it means abstention from economic activity. For housewives, it means cutting down on the day's chores. In case of retired persons, it means pruning of his/her regular activity. For students, it means absence from attending classes.

II Rate of Ailments

The morbidity and restricted activity rates depicted in Figure 2 reveal an exceptional situation. The estimated morbidity rate of Kerala and Tamil Nadu was higher than the national level. Kerala, the model state, has recorded the highest rates. Though in terms of restricted activity, its intensity was less, compared to the least performing states, it was four times ahead. However, Madhya Pradesh and Uttar Pradesh recorded the reverse pattern of less than the national average in both

the estimated rate of illnesses. The mismatch in trend was observed between high and low performing states.

Figure 2: Rate of Ailments in Selected States across Sex



Note: RA-Restricted Activity.

Source: Computed with unit data from NSS 71st round 2014.

Morbidity Adjusted Life Expectancy

The computed life expectancy from the Age Specific Death Rates 2009-2013 exhibits a similar pattern as Figure 1 for the selected states. Table 1 shows that females and urban life expectancy at birth and at age 60 were both higher than their counterparts, males and rural people, in all the selected four states except Kerala where it was almost equal irrespective of place of residence. The framework of computed DALY was used to assess a person's healthy expected life time years.

a. Sex-Wise Differentials

The life expectancy at birth in Kerala for males and females was 72 and 77 years respectively. The share of healthy years lost due to morbidity was 36 per cent for females and 33 per cent for males. In Tamil Nadu the life expectancy at birth for males and females was 69 and 72 years respectively. Males had 83 per cent proportion of life years free of illness to their expected years, while females had only 78 per cent proportion. This implies that diseases consume 17 per cent male and 22 per cent female life years. In Madhya Pradesh five years (eight per cent) for females and five years (seven per cent) for males were lost due to morbidity.

In Uttar Pradesh, 12 per cent females and nine per cent males live in sickness. Males have shorter life expectancies than females, but there is less morbidity during their expected life period. Kerala exhibits lesser disability-free years compared to other three states. At age 60 this was still worse in Kerala, with disability free life years only 33 per cent for males and 32 per cent for females. This demonstrates that Tamil Nadu and Kerala had both high morbidity and low mortality rates. Curative medical care has condensed only the fatality rate without sustained improvement in nutrition, water supply and sanitation (Irudhaya Rajan and James 1993, Suryanaryana 2008).

b. Region-Wise Differentials

Table 1: LE and Morbidity Adjusted DALY in Selected States by Sex

Category	Male			Female		
	DALY	LE	DLFE/LE (%)	DALY	LE	DALY/LE (%)
<i>DALY_Morbidity at birth</i>						
Kerala	48.3	71.6	67.4	49.0	76.9	63.8
Tamil Nadu	56.6	68.0	83.2	56.3	72.3	78.0
Madhya Pradesh	57.4	62.1	92.5	60.0	64.9	92.4
Uttar Pradesh	56.4	62.1	90.8	57.3	64.9	88.4
<i>DALY_Morbidity at age 60</i>						
Kerala	5.9	17.8	33.1	6.7	20.9	32.3
Tamil Nadu	9.8	17.1	57.2	11.2	19.0	59.3
Madhya Pradesh	12.3	15.6	79.0	15.5	17.4	89.0
Uttar Pradesh	11.7	15.7	74.9	13.7	18.1	75.5
Category	Rural			Urban		
	DALY	LE	DALY/LE (%)	DALY	LE	DALY/LE (%)
<i>DALY_Morbidity at birth</i>						
Kerala	48.7	74.6	65.3	48.7	74.9	65.0
Tamil Nadu	57.6	68.9	83.6	55.3	71.8	77.0
Madhya Pradesh	57.8	62.1	93.1	62.4	68.7	90.8
Uttar Pradesh	56.6	62.6	90.4	58.2	67.1	86.7
<i>DALY_Morbidity at age 60</i>						
Kerala	6.9	19.8	34.8	5.6	19.5	28.7
Tamil Nadu	12.1	17.5	68.9	9.0	18.8	48.0
Madhya Pradesh	13.4	15.9	84.6	15.4	18.5	83.2
Uttar Pradesh	12.6	16.5	76.6	12.6	18.1	69.8

Source: Author's calculations.

In Kerala, morbidity costs 29 years (35 per cent) of life, regardless of the place of residence. Despite the fact that the expectation of life years at birth in Tamil Nadu for rural masses (70 years) was lower than for urban folks (73 years)

by three years, the quality-of-life for people in urban region was described as disadvantaged. In Madhya Pradesh nine per cent of urbanites' lives and seven per cent of ruralites' lives were lost due to morbidity. In Uttar Pradesh the figures were 13 per cent and 10 per cent respectively. Though the life expectancy was low, the predictions of healthy living years were high in rural areas. In Tamil Nadu, compared to the other three states, there was a significant disparity between rural and urban children in terms of disability-free life years. Rural children were seven per cent better off at birth than their counterparts in Tamil Nadu. Though health-care facilities were more readily available in cities, the externalities of urbanisation, food practices, sedentary lifestyles and pollution outweigh rural life. Uttar Pradesh and Madhya Pradesh reveal a reverse trend of relatively lesser life expectancy but a higher per cent of disability-free life years for all categories. Thus, it was obvious that there was high frequency of diseases with minimum physical infirmities. Seeking health care, treatment actions and proper follow-up intervention at the right time had reduced physical disabilities in the better performing states. The dominance of non-fatal illnesses was negatively correlated with expected additional healthy life years.

Figure 3: DALY_Morbidity at Birth_Male

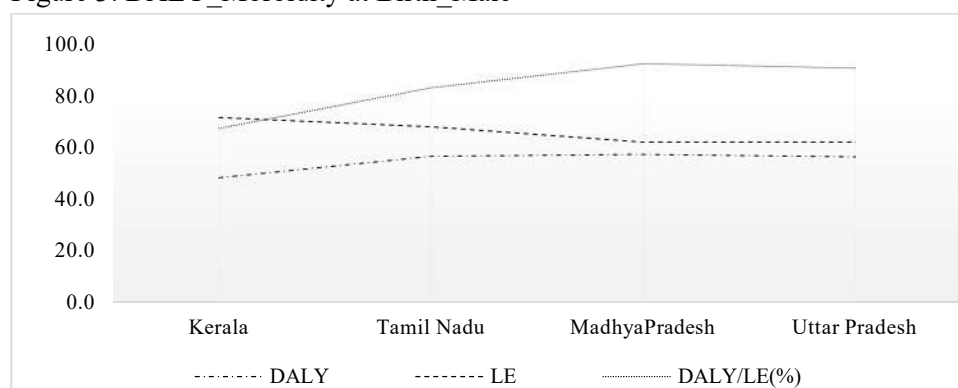


Figure 4: DALY_Morbidity at Birth_Female

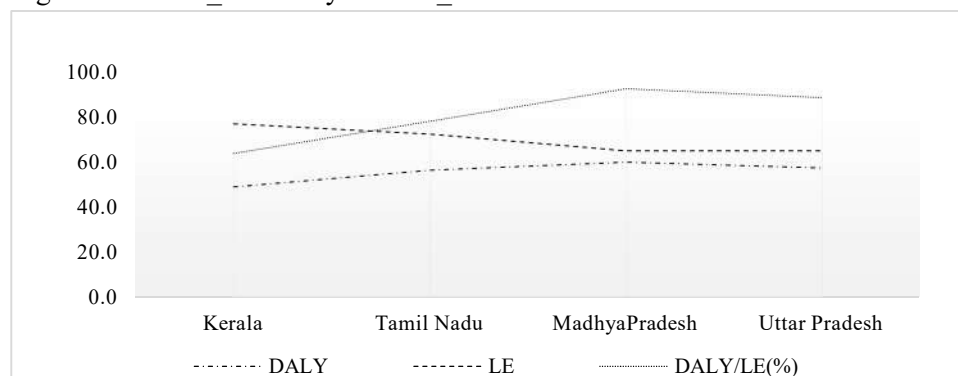


Figure 5: DALY_Morbidity at Age 60_Male

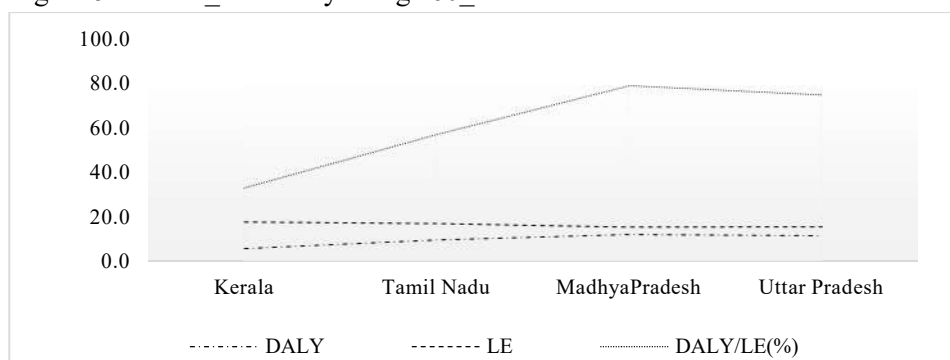
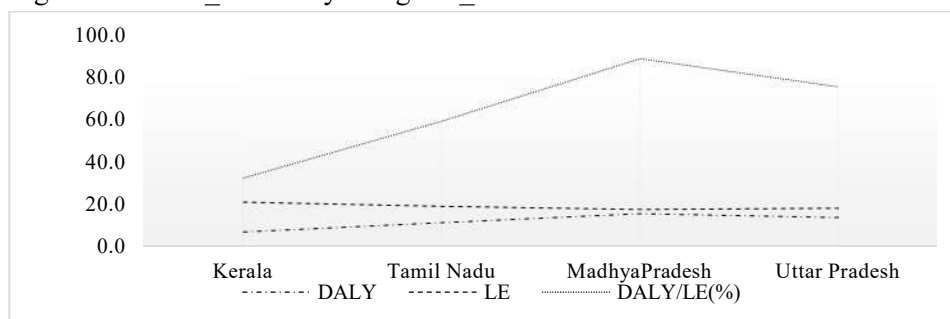


Figure 6: DALY_Morbidity at Age 60_Female



Source: Author's calculations.

III Restricted Activity Adjusted Life Expectancy

The restricted activity episodes represent the people's inability to carry on activities such as work, housework or school attendance. DALY combined with RA (DALY_RA) was higher for females than males and urban people than rural people, except for the elderly in Kerala, where rural folks were slightly in an advantageous position compared to urban people (Table 2). The percentage of restriction free life years in selected three states, except Kerala, was above 90 per cent. For elderly people, the RA adjusted DALY was again higher in urban areas than in rural areas. Very few senior citizens who have retired from jobs in the organised sector, generally located in urban areas, earn retirement benefits. Most senior citizens, even in poor health, have to do some kind of labour to earn their livelihood. The elderly have greater obstacles as a result of urbanisation, fewer children and nuclear families. They encounter a wide range of health challenges, including heterogenous ones like sensory impairment, infections and degenerative diseases. Apart from socio-economic inequalities, the needs differ. Along with good geriatric care, children should provide special care, particularly to grandmothers.

Table 2: LE and Restricted Activity Adjusted DALY in Selected States

Category	Male			Female		
	DALY	LE	DALY /LE (%)	DALY	LE	DALY /LE (%)
<i>DALY_RA at birth</i>						
Kerala	64.3	71.6	89.7	68.9	76.9	89.6
Tamil Nadu	66.2	68.0	97.3	69.8	72.3	96.6
Madhya Pradesh	60.2	62.1	97.0	63.3	64.9	97.5
Uttar Pradesh	60.2	62.1	96.9	62.6	64.9	96.5
<i>DALY_RA at age 60</i>						
Kerala	14.4	17.8	80.8	16.3	20.9	78.0
Tamil Nadu	16.2	17.1	94.5	18.1	19.0	95.4
Madhya Pradesh	14.4	15.6	92.3	16.9	17.4	97.4
Uttar Pradesh	14.3	15.7	91.1	16.5	18.1	90.8
Category	Rural			Urban		
	DALY	LE	DALY /LE (%)	DALY	LE	DALY /LE (%)
<i>DALY_RA at birth</i>						
Kerala	66.1	74.6	88.7	68.1	74.9	90.9
Tamil Nadu	67.1	68.9	97.4	69.3	71.8	96.4
Madhya Pradesh	60.5	62.1	97.4	66.5	68.7	96.8
Uttar Pradesh	60.6	62.6	96.7	64.9	67.1	96.7
<i>DALY_RA at age 60</i>						
Kerala	15.8	19.8	79.7	15.4	19.5	78.9
Tamil Nadu	16.8	17.5	95.8	17.7	18.8	93.9
Madhya Pradesh	15.1	15.9	95.4	17.4	18.5	94.0
Uttar Pradesh	15.0	16.5	90.6	16.7	18.1	92.1

Note: RA-Restricted Activity.

Source: Author's calculations.

Figure 7: DALY_RA at Birth_Male

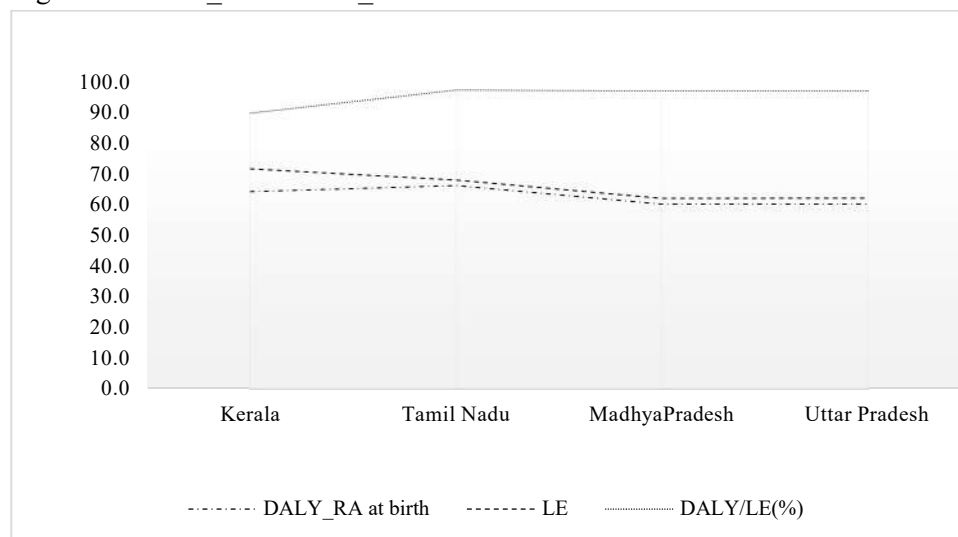


Figure 8: DALY_RA at Birth_Female

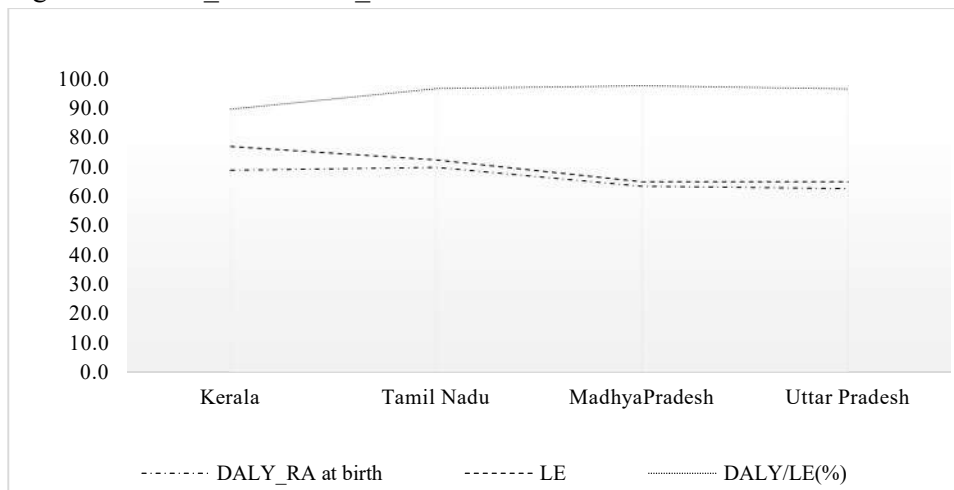


Figure 9: DLFE_RA at Age 60_Male

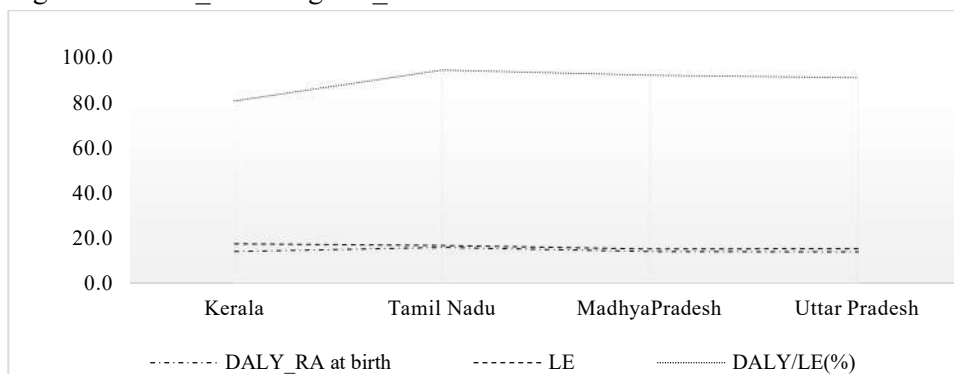
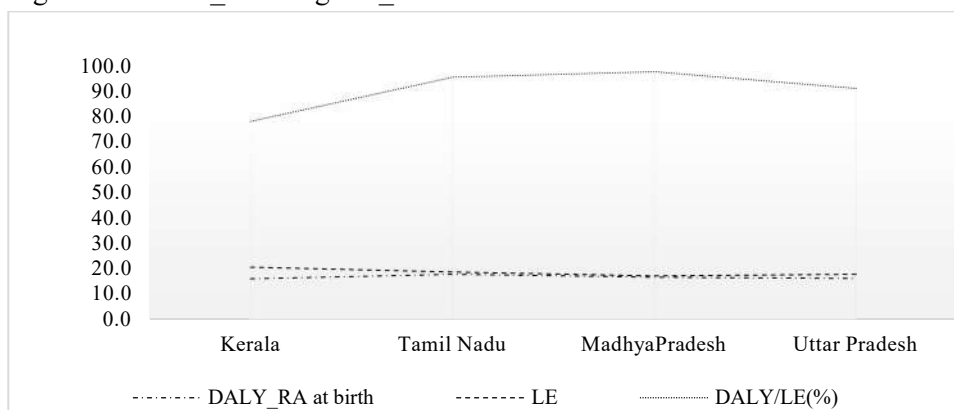


Figure 10: DLFE_RA at age 60_Female



Source: Author's calculations.

IV Discussion

The DALY is a metric that quantifies the overall health effect linked to both morbidity and mortality. It summarises the population's overall health and compares regions in a single value. The findings reveal comparable tendencies to those found in international studies. The studies on two London districts revealed gender and area differences in DALY (Dodhia and Phillips 2008). The progressive increase in quality adjusted life years (QALY) among United States adults as a result of a consistent decline in mortality rates varied by subgroups. People with chronic illnesses lost more QALY's than those without illness among adults over the age 65 (Haomiao, *et. al.* 2011 and 2016). In Italy, it was concluded that the health improvements had rejuvenated ageing besides the emerging gender gaps in survival conditions (Elena Demuru and Viviana Egidi 2016). A United States surgeon reported that the health of the population was determined largely by lifestyle (50 per cent) followed by biological and environmental factors (20 per cent each), whereas health system-related factors contribute only 10 per cent (MOHFW 2017 b). Smoking, high alcohol consumption, physical inactivity and obesity reduce life expectancy and health related quality of life in Denmark (Henrik, *et. al.* 2007).

Nevertheless, it was claimed that diabetes was prevalent even among the poor in India, indicating that it was not due to lifestyle choices but due to the impact of under-nutrition, which causes chronic health problems (Vikas Bajpai 2018). The data on monthly per capita kilograms of food consumption in rural and urban areas describes the lower intake of vegetables and the higher intake of packaged processed foods (NSSO Report 558, 2014). On an average, a person consumes more than one kilogram of packed processed food a day. This contemporary custom proved detrimental to living a healthy lifestyle. Diabetes and hypertension were consequences of the consumption of fast foods, which leads to obesity and an increase in cardiovascular diseases. Tobacco use, an unhealthy diet and lack of physical activity all increase the risk of chronic illnesses.

According to the draft National Health Policy 2015, overcrowded public health hospitals, address less than 15 per cent of all morbidities, forcing people to seek private care. Therefore, among rural people, there were more chances for not only untreated illness but also unidentified diseases. The self-perceived illness included morbidity, which may lead to over-reporting by females and urbanites or under-reporting by males and rural residents, so the chronic illness rate was also calculated from the unit data (Appendix I). Tamil Nadu and Kerala ranked exorbitantly high in chronic illness rate compared to Madhya Pradesh and Uttar Pradesh, registering the least at national level. The lifestyle-practices of urban people have resulted in high prevalence of chronic illness among them. The rural-urban disparities in the rate of chronic illness were high compared to male-female differences. This authenticates that disability adjusted life years estimated for the state across groups were neither over nor under reported. Chronic illness diagnosis has to be instigated scrupulously in all public care institutions to enable early

detection. It suggests that, during the transition period, Kerala and Tamil Nadu had to focus on improving timely and accurate diagnosis of chronic diseases. Subsequently, chronic illnesses remain symptomless for an elongated time period. More attention needs to be given to early detection so as to manage the illness with less loss. Instantaneously, preventive behavioural practices like dietary changes and exercises would help to combat life with disabilities. The increase in life span caused by the demographic transition has been accompanied by diseases and disability caused by high nutrient calorie intake and less physical activity, as well as the epidemiological transition. The Indian health structure, despite the epidemiological transition, was unable to re-orient itself to effectively address the intensifying problem of degenerative diseases as the focus was still largely on providing acute care and not on providing chronic care (Sailesh Mohan and Prabhakaran 2014).

In times of health crisis, Tamil Nadu has reacted effectively. For instance, during the outbreak of leptospirosis in the government medical college in Chennai, the health inspectors from nearby districts were posted to carry out preventive measures. Due to lack of this effort, Delhi experienced dengue outbreaks that originated from medical colleges (Monica, *et. al.* 2010). The public health system plays added role to the curative medical part. Despite its low per capita income, Kerala's social overhead capital development of high literacy, high life expectancy, improved access to health care, low infant mortality and low birth rates has placed the state's metrics on par with developed nations, establishing the state as a Kerala model of development.

To identify the prevalent illness, health seeking behaviour in Madhya Pradesh and Uttar Pradesh needs to be improved. The proportion of the population served by public care in Uttar Pradesh was lower than the national average. Low life expectancy was chiefly caused by preventable child deaths, low institutional delivery, and lack of access to piped water and sanitation facilities. A study concluded that in Madhya Pradesh, half of the public district hospitals were technically inefficient in providing maternal health care services (Tej Ram Jat and Miguel San Sebastian 2013).

In all four states, the years of DALY were less than years of life expectancy, implying high morbidity. The better-performing states were unable to take fuller advantage of longer lives, while in undeveloped states, most of the illness were left undiagnosed.

Implications

- Proper identification of diseases at the right time to be improved.
- Long-term disease diagnosis has to be rigorously done in the public health care centres and adequate restorative care to be made available persistently.
- Sufficient geriatric care facilities need to be inbuilt in the system as well as in the families.

- People's access to adequate public health care in low-performing states, particularly rural areas must be addressed.
- Malnutrition must be eradicated. The availability and responsiveness of low-cost nutritious food has to be instilled in the community, particularly among the city dwellers.
- Undertake massive public awareness initiatives to promote physical activity and healthy lifestyle behaviours.

V Conclusion

Appropriate precautionary measures could combat the incidence of chronic illness. Satisfactory health care, timely availability and affordability of health systems at the onset would diminish the intensity of long-term diseases. Additional years of life gained should not be mere deferment of mortality and life filled with disabilities and discomfort. Henceforth, proper progeny care and financial independence must be assured to overcome the elderly's health needs. The decrease in mortality and the subsequent upsurge in life expectancy accompanied by the decline in incidence of morbidity can be made possible by a planned comprehensive health care system with the inclusion of preventive, curative and restorative measures along with adequate care. An increase in longevity with outstanding geriatric care will help in transforming them into a productive, experienced resource force for the nation.

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Appendix I

Rate of Chronic Ailments and Selected States in India by Sex and Region

State	Total	Male	Female	Rural	Urban
Kerala	208	186	229	201	217
Tamil Nadu	103	89	116	86	120
Madhya Pradesh	20	19	22	17	30
Uttar Pradesh	25	23	27	23	34
India	48	42	55	40	67

Source: Computed from NSS71st round unit data.

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