Some Unity in Diversity: Analysing Inequality, Change, and Mobility in Rural South India

Lindberg, Staffan

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Some Unity in Diversity:

Analysing Inequality, Change, and Mobility in Rural South India[1]

Staffan Lindberg

I am deeply honoured to have been given this opportunity to pay homage to Professor Ramkrishna Mukherjee (hereafter RM), an autonomous and distinguished scholar, who has left a major imprint on Indian sociology and social sciences. For me, this is an opportunity to engage in a dialogue on how to analyse contemporary Indian society and to share my perspectives developed over a period of half a century of Indian studies. This implies dealing with a broad canvass of bewildering facts about our present time and to delineate an analytical perspective useful for an informed understanding of Indian society.

RM's long career and multiple contributions covered a vast range of subjects: agrarian relations (mainly in West Bengal); class and caste; family; urbanisation and social change; nationalism (in Bangladesh); colonial exploitation (by the East India Company and in Uganda); methods, combining survey data with qualitative studies, and theory based on inductive method; and designing of National Sample Surveys. His approach was to use substantive

[1] I want to thank the following persons for giving comments on an earlier draft of this text: Professor Gunnel Cederlöf and Professor Gunnar Olofsson, both at Linnaeus University; Dr. Kenneth Bo Nielsen, University of Bergen and Centre for Development and the Environment, Oslo; Professor Per-Olof Olofsson, Halmstad University College; and Dr. Neil Webster, Danish Institute of International Studies, Copenhagen.

concepts for the analysis of a particular phenomenon. His perspective was Marxist and historical: the structures he studied were a result of a process and were in themselves a part of an on-going process. Two such structures he focused on were family and caste.

The use of abstract models, as suggested and practised by RM, provides a fruitful entry into a full-fledged analysis of various social phenomena. My reading of RM is that he gave ample evidence of sociology as the broadest of the social sciences in that it can be applied to all social relations across the human world. In this chapter, I will draw on this insight in proposing a sociological model for the study of inequality, change, and mobility, which I will illustrate with some field data from rural South India.

Towards a Systematic Sociology of Inequality

The basic unit of sociological analysis is social role — role positions, role performances, and role conflicts, and their change over time within various institutions. Social roles are collective features of social structures and they make possible a relational analysis of social interaction and change over time. In sharp contrast to individual characteristics and individual mobility, social roles make possible an analysis of change through social mobility as a collective process. Social roles and interaction are, as a rule, shaped by power, dependence, and inequality. As a result, social stratification, inequality, and conflict are central social mechanisms in stabilising as well as changing society. They form patterns of in-groups and out-groups; ‘we’ and ‘they’ social identities are powerful mechanisms of social interaction over time.

Inequality can basically be understood in terms of *four durable social categories*, namely, class, gender, generation, and status. These categories often intersect, such as when class inequality reinforces inequalities in terms of gender, generation, and status. These four social categories of inequality can be used in understanding how the *five driving fields of forces* in

society — economy, demography/ecology, culture, status, and politics — operate and combine in various ways. Göran Therborn explains these fields as follows:

> The evolution of humankind is a contingent, open-ended process, driven, primarily, through *five fields of forces*, of the mode of livelihood, of demographic ecology, of distribution of recognition, rank and respect, of cultures of learning, communications and values, and of politics (violent or non-violent) by collective organization. Though interdependent and interacting, and often in asymmetrical relationships of influence, these fields are … irreducible to each other (2011: 84; emphasis added).

By using the four durable social categories of inequality in analysing these five fields of forces, and their possible combinations, we potentially have powerful conceptual tools to understand various structures of inequality. Looking, for example, at the family as a basic relationship between demography and gender, or a caste structure as a combination of rank, class, power, and culture of learning, provides potent entry points for understanding social roles in various institutions in an historical perspective.

Indian Social Modernity Today

India today is different in many ways from the time when RM did most of his research. However, many of the themes, and the models he used for understanding them, are still valid. What is most striking about contemporary development in India is the rapid commercialisation and mechanisation of agriculture; the acceleration of urbanisation, especially the growth of million-plus cities; the proliferation of services and trade; and the smallness of the manufacturing sector in proportion to the huge emerging internal market. Behind all this is a more intensive phase of globalisation at all levels of society from economy to media. India,

aiming to become one of the foremost powers in the world as a nation-state and civilisation, is being moulded in this encounter.

As a process, this is a ‘progression’, without necessarily being ‘progressive’, in all respects clearly under the banner of an Indian modernity. The atmosphere is ‘post-post-postcolonial’; the driving force of change is domestic market, not exports. Everything is negotiated and changing — social structures, cultures, religious beliefs, and individual identities. Regional and local political cultures and issues are predominant within the overall transformation.

One crucial factor concerns the changing role of caste as being earlier coupled with class position as ‘caste in class’ (Mukherjee 1999). In the new economy, the same caste is found both in exploiting and exploited classes within the same firm, thereby transcending the borders of class cultures with a caste unity and dependence that defies class conflicts on a broader level (Harriss-White 2003).

Another factor is the role of family, as suggested by RM, developing in two opposite directions: nuclear, reflecting the changing role of the household in the wage economy, or joint, reflecting the family in the petty commodity production straddling the farm and the non-farm sectors.

Family in Rural and Urban India

One research interest of RM was in changes in family structure in West Bengal. He started with the simple model in which a nuclear family consists of a married couple with or without children, and an extended family, of one married couple and other relatives (grandfather, grandmother, siblings, etc.). The joint family is an extended family, which consists of two married couples living under the same roof. Extended and joint families in a patriarchal system put more burdens on women members and are spring beds of gender discrimination, the most

obvious example being the role of the young daughter-in-law, virtually subservient to all the needs of the rest of the household.

RM's research finding was that, unexpectedly, in the 1940–50s the extended family was more common in towns and cities than in villages (Mukherjee 1963). The common understanding then was, and still is, the opposite, that is, with urbanisation, the nuclear family type would become more dominant as a form of family organisation (Khan and Rizvi 2015).

RM's explanation of this pattern was that the extended family was coupled with landownership and that this became increasingly an urban phenomenon, as landed families shifted their location to towns with richer markets and social services. The landless workers living in nuclear families tended to remain in villages close to their place of work. It is remarkable that this possibility of Indian 'modernity' has not featured much in contemporary discussion of family life. There is surprisingly very little interest in the topic.

Table 12.1 presents data on the family patterns found in six villages in the Kaveri delta in Tamil Nadu over twenty-five years (1980–2005). For Tamil Nadu rural areas as whole (1992–93), we get the following results: nuclear (and incomplete nuclear) family 63 per cent, and extended and joint family, 37 per cent. This shows that the situation in the six villages cited in Table 12.1 is typical.

Table 12.1: Percentage distribution of households by family type in six villages in the Kaveri Delta, Tamil Nadu – 1980 and 2005

Type of family	1980	2005
Nuclear (and incomplete nuclear)	54	57
Extended (and joint)	46	44

Source: Lindberg et al. (2016)

However, if we break down these figures into two different types of villages — canal irrigated villages and rain-fed villages — we find the situation to be different (see Table 12.2). In the canal irrigated villages, nuclear family is predominant, while in the rain-fed villages, the

extended and joint family type is predominant. This pattern has been strengthened over twenty-five years, from 1980 to 2005.

Table 12.2: Percentage distribution of households by family type in canal irrigated villages and rain-fed villages in the Kaveri Delta, Tamil Nadu – 1980 and 2005

Type of family	Canal irrigated villages		Rain-fed villages	
	1980	2005	1980	2005
Nuclear (and incomplete nuclear)	56	66	52	43
Extended (and joint)	43	35	46	57

Source: Lindberg et al. (2016)

How can we understand this? My interpretation, following the sociological model suggested above, is to see the family form (basically a combination of gender and demography) as caused, or at least strongly influenced, by the economy and class relations. Landed property and the prospect of combining agriculture with non-farm activities provide the opportunity for joint or extended families.

In the canal irrigated villages, agriculture is a perennial activity. Landownership is concentrated. Most households have little or no land to cultivate, and make a living as farm wage workers. In the rain-fed area, on the other hand, most households have land and few are landless. However, since there is only one crop per year, most villagers earn their livelihood outside the farm sector, either in local crafts, like gem polishing, or in urban wage work, such as textile work or construction labour. They are at the same time more landed and more 'urbanised' than those in the canal irrigated area.

The explanation seems to be that, in the rain-fed villages, the joint family offers an opportunity to combine agriculture and non-agriculture at the household level, in which non-farm income can be invested in farming and consolidate landholding and in well-irrigation. This is also the area which has seen the strongest income development over the period studied. In the canal irrigated area, on the other hand, household income depends on the number of wage workers in the household and there is no advantage in pooling income from other resources, as the opportunities for non-farm activities are much less. In the 1960s, RM did not

consider this possibility. It is not unlikely that, with the prevalence of petty commodity production in the urban economy, pooling of kinship resources in 'capital' accumulation would make the joint or extended family more common also in contemporary cities.

Caste in Contemporary Society

RM also dealt with caste in the urbanisation process (Mukherjee 1963); caste being the most closed form of social organisations, based as it is on kinship endogamy, class relations, and cultural and political dimensions (see Jodhka 2012, 2015). What he found in the 1960s was the continued relevance of caste as the basic unit of primary organisation. Urbanisation did not lead to the withering away of caste. On the contrary, caste associations helped their members to orient themselves in the urban environment and this also formed the basis of transformed caste identities in rural areas.

I do not have data on case for urban areas in Tamil Nadu, but I have data on rural caste distribution and movements from 1980 to 2005 (see Table 12.3). The first impression on our return to the villages in 2005 was that the traditional social structure of caste, family, and kinship had not changed much during the past twenty-five years. The continuity and stability is true for the households and their habitats. With the relative stability of the households, it follows that the same castes are there in 2005 as in 1980, and they live in the same localities, making the villages appear as stable and socially segmented as ever. There are a few examples of inter-caste marriages, but caste endogamy is still strongly entrenched.

Table 12.3: Percentage distribution of households by caste in six villages in the Kaveri Delta, Tamil Nadu – 1980 and 2005

Rain-fed villages	1980	2005
Traditional upper castes		
Brahmin	3	1
Soliya Vellala	8	5
Intermediate castes		
Muthuraja	29	34
Vanniyar (Padayachi, Kandar)	6	10
Scheduled Castes		
Pallar Moopan	30	33
Paraiyar	2	3
Paraiyan Valluva	5	-
Other castes	15	14
Total	100	100
Canal irrigated villages		
Traditional upper castes		
Soliya Vellala	3	2
Intermediate castes		
Udaiyar	16	19
Gounder	35	40
Muthuraja	12	11
Scheduled Castes		
Pallar Moopan	8	6
Paraiyar	8	12
Paraiyan Valluva	5	-
Madharis	3	2
Other castes	10	8
Total	100	100

Source: Lindberg et al. (2016)

Analysing the changes, however, one could engage in some entry points. In the canal irrigated villages, the number of upper caste households has declined, with the Brahmins losing, or rather selling, their land and leaving the villages, while the number of intermediate caste households has grown both in numbers and importance. The Scheduled Castes have remained stable at one-third of the households, but their social position has been strengthened through increased landownership due to land reforms (see Djurfeldt et al. 2008). In the rain-fed area, the intermediate castes have become more dominant, while the Scheduled Castes have diminished to about one-fifth of the households. These Scheduled Caste households have been

able to buy some dry land from the intermediate castes, so that, in 2005, only 9 per cent of them were landless.

What is most striking is that there has been a marked change in the self-identity and mobilisation of the Scheduled Castes — Pallars, Paraiyars, and Madharis — in the study villages. Their mobilisation was, in the beginning, a part of a larger mobilisation of the Scheduled Castes in Tamil Nadu, without any reference to their particular caste identities. This was initiated by the Paraiyars and led to the founding of Ambedkar Societies in the Scheduled Caste settlements. However, an alternative mobilisation among the Pallars was later initiated and led by Dr Krishnasamy, who formed a political party called Puthiya Thamizhagam. When we discussed this matter with some young leaders and asked how they could hope to wield political influence by organising along caste lines and with the Pallars being less than 10 per cent of the population in Tamil Nadu, they answered that this was a matter of honour and recognition (see Racine and Racine 1998).

The Scheduled Castes are still discriminated against. The most glaring practice is the 'two-glass system' at some tea stalls. In the past, the Scheduled Castes had to go around to the back of the tea stall and were served through a hole in the wall. Now they are served in separate glasses marked at the bottom with a cross. They have responded to this by lodging complaints with the police. Although the practice is proscribed by the law, it is still in vogue in some villages. A similar pattern of discrimination was observed in a study of some villages around Tiruppur in Tamil Nadu (Carswell and De Neve 2014: 108–09).

There is also rather strong bitterness among the Scheduled Castes about 'the other communities' in the villages. Some Scheduled Caste colonies do not have piped drinking water; others suffer inconvenience by being forced to live in a low-lying and flood-prone area or near the village burial ground with constant smoke hanging around, as in the case of one of the rain-fed villages we studied.

Thus, what has been reported from all over India in the last decades is true also in the villages we have studied: there is on-going process of changing relations, a situation of flux, in which old caste hierarchy and discrimination are intermingled with new and less in-egalitarian relations. Change in the control over land among the castes is the most powerful factor behind the changes that we can see in this area. However, all-India survey data do not generally show any decline in land control of the upper castes in recent years.

Another factor is the entry of Scheduled Castes into non-farm occupations in which the traditional division of labour between castes does not hold any more. A third element is the spread of primary education, which now almost universally extends to the Scheduled Caste children. When this is combined with local democratic politics and a quota system for the representation of Scheduled Castes in government jobs and government-funded educational institutions, there is a new dynamic and emerging transformation of caste relations.

Models of Inequality

I will now try to use two distinct models of inequality to understand the caste structure. The first model is provided by Charles Tilly (1998), with his basic analytical concepts of exploitation, opportunity hoarding, emulation, and adaptation in analysing various unequal social systems, and their reproduction and change over time. They form basic mechanisms in the class, cultural, religious, and political power structure of a society. Exploitation, in Tilly's understanding, is based on asymmetrical categorical pairs — such as men/women, landowners/landless labourers, white/black, capitalists/workers — 'in which some well-connected group of actors controls a valuable, labor-demanding resource from which they can extract returns only by harnessing the efforts of others, whom they exclude from the full value added by that effort' (ibid.: 86–87). Subordinate groups can hoard opportunities that open up

via, for example, new technology, and the utilisation of new resources, work migration, commerce, and war. Relations of exploitation are often emulated in institutions and organisations in society and adapted to the particular historical circumstances and need for legitimation.[2]

The second model is about the dimensions of inequality developed by Partha Nath Mukherji (2012). Exploitation, according to Mukherji, is not one-dimensional; he discusses four asymmetrical domains that are involved: economic exploitation, political oppression, cultural discrimination, and gender discrimination. A fifth asymmetrical domain is eco-environmental exploitation, 'with differential consequences for the stratified and hierarchical population' (ibid.: 43). In Mukherji's understanding:

> The five conceptual cross-cutting domains of asymmetries are not mutually exclusive; they are analytically differentiated but interdependent, interpenetrating and interfaced. They, particularly the first four, constitute the abstraction of society or social system as a system of asymmetries in social interaction, given that the 'whole' is greater than the sum of its domains and their structures of asymmetries (ibid.: 44).

These two models pertain to collective social mobility and change, compared to, for example, Amartya Sen's model of individual mobility (Sen 1999). Figure 12.1 presents the analytical dimensions of the inequality matrix applied to the two models of inequality. In what follows, I apply these models to analyse the situation of a Scheduled Caste, the Madharis, in Tamil Nadu.

[2] According to Tilly, this analytical framework is inspired both by Karl Marx and Max Weber: 'It builds a bridge from Max Weber on social closure to Karl Marx on exploitation, and back' (1998: 7). However, I think, as does Olin Wright (2015: 57–78), that the framework of *Durable Inequality* (Tilly 1998) is as close to a Marxian position as one gets in sociological analysis without explicitly recognising it.

Figure 12.1: The inequality matrix applied to the two models of inequality

Driving fields of forces	Durable social categories			
	Class	Gender	Generation	Status
Economy	**Exploitation**			
Demography/Ecology				
Culture				
Status				**Discrimination**
Politics				**Oppression**

Madharis: The Trajectory of a South Indian Scheduled Caste

The following analysis builds on my fieldwork among 415 Madhari families in fifteen villages in the Tiruppur region of Coimbatore district, Tamil Nadu, in 1967 (Lindberg 1969, 2016). Gunnel Cederlöf (1997) has done a thorough historical study of this caste group from 1900 to 1960s, using my interviews and material as an ending point (1997). Her study gives me a processual understanding of the situation in the 1960s. This is followed by a comparative analysis based on Judith Heyer's fieldwork among the Madharis during recent years.

The agriculturally based social structure in the Tiruppur region, where the fieldwork was done, revolved around the two poles — the Gounders, as landowners, and the Madharis, as workers — connected by interdependence and exploitation. The Gounders were considered as the lords of the land in Kongu Nad, carriers of an elaborate religious and kinship system tied to the soil. The Madharis were irrigation workers on the land; they both produced the leather bags needed for drawing water from the deep wells and handled the lifting of water by means of bullocks. The Madharis were considered untouchable, as they were also scavengers, tanners, and latrine cleaners. Thus, the whole weight of oppression fell on them like a millstone tied around their neck.

From Tilly's analytical viewpoint, one can see here a stable structure of exploitation,

> in which some well-connected group of actors [the landowning Gounders] controls a valuable, labor-demanding resource from which they can extract returns only by harnessing the efforts of others [the landless Madharis], whom they exclude from the full value added by that effort' (1999: 86–87).

This 'internal' asymmetrical categorical pair, to use Tilly's term, is then reinforced by emulation (ibid.: 95), that is, by the use of an 'external' asymmetrical categorical pair of pure and impure — touchable and untouchable — borrowed from the larger ideological framework of Brahmanical theology.

A further aspect of the stability of this exploitation structure is the way it was adapted to local conditions and the way it was able to create vested interests in it among some of the Madhari labourers, through favourable conditions of annual employment in terms of remuneration, loans, and gifts.

An additional crucial point was that the Madharis, though working as agricultural labourers for many generations, were still classified as a left-hand caste, that is, as outsiders. According to Brenda Beck (1972), left-hand castes were regionally grounded, whereas the so-called right-hand castes were locally based in relation to land ownership and status. The left hand castes were seen as 'outsiders' in the villages. Thus, not only were the Madharis marked as 'untouchable', but they were also seen as outsiders, as strangers not to be trusted — a double underdog position and stigmatisation! This made their relation to the other untouchable community, the Paraiyars, very problematic. Though both castes were 'untouchable', the Paraiyars, being classified as a right-hand caste, always considered themselves far above the Madharis, since the latter were outsiders and, moreover, worked with the skins of dead animals. One consequence was that, while the Madharis always were made to live in separate colonies (*cheri*s), the Paraiyar houses lay adjacent to the other caste residences in the villages.

In 1967, the Madharis were in deep crisis because mechanisation of irrigation and farming had made them redundant. They were literally starving, as can be seen from Picture 1.

Picture 12.1: The Madharis in 1967
Photo credit: The author

In the 2010s, the economic situation of the Madharis has radically changed for the better. The Madharis, still residents in the same villages, have become free wage workers in agriculture, including as machine operators, working in gangs and bargaining for wages for each farming operation. With industrialisation and urbanisation, some Madharis and most members of other caste groups in the villages have left agricultural work. Scarcity of labour has benefitted the Madharis, who continue to work as agricultural labourers and secure a much higher remuneration than they did fifty years ago.

The Madhari families now have at an average two children going to school and, in one-third of the households, the wife, is a housewife during child-birth and rearing. Clothing and housing standards have improved a lot (see Pictures 1 and 2, taken in 1967 and 2010 respectively). This knowledge comes from research on the contemporary scene by Heyer (2010, 2012, 2013, 2014, 2016a, 2016b).

Picture 12.2: The Madharis in 2010
Photo credit: Judith Heyer

Following Tilly, we here witness a kind of opportunity hoarding: distinct subordinate family/kinship groups migrate for work and create a monopoly out of that opportunity (chain migration). In the case of Madharis, they have for a long time been confined to their villages because of lack of education and the double stigmatisation. Now, with externally created labour market all around, they can organise into semi-trade union groups and bargain for higher wages. There are no competing labourers around. This is a kind of 'reversed' opportunity hoarding. However, some of the Madharis are bonded labourers in local power-loom industry and are severely exploited (Carswell and De Neve 2013).

Using Mukherji's dimensions of inequality, we find that the political oppression has diminished with political mobilisation of the Madharis. They now have a voice in local politics

through the reservation system, which includes being able to intermittently occupy the chairs in local government bodies.

Staying in the villages and working for the same masters as ever, the Madharis are still exploited, discriminated, and oppressed, but the worst forms of exploitation and discrimination have disappeared. Now, young educated Madhari boys and girls dream of an urban future in factories. There is a new dynamic in the emerging structure.

Conclusion

As we have seen above, the use of abstract models and empirical studies as suggested and practised by RM in various ways provides a fruitful inspiration for a full-fledged analysis. It need not be a very complex model. The simple model of family structures serves as a powerful entry in understanding the dynamic of family life in India today. If we add to these more recently developed models of social interaction, such as the exploitation models by Tilly and Mukherji, we have a powerful tool of social analysis in our hands.

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