



From Varna to Jaati: Historical Evolution and Institutionalization of Caste in India

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ABSTRACT

The caste system in India represents one of the oldest forms of social stratification, evolving from a flexible classificatory framework into a rigid system of institutional inequality. This paper traces the origins of caste through early historical theories, examines its expansion through occupational and marital practices, and analyses its transformation during the colonial and post-colonial periods. It further explores how caste continues to shape modern Indian society despite constitutional safeguards and affirmative action policies. The study argues that caste persists not merely as a social identity but as a deeply embedded structural system requiring transformative approaches for meaningful change.

Since time immemorial it has been observed that the Brahmanical society has been classified in various categories. This classification has a number of dimensions attached to it. There is no fixed date as to when this caste system began. It, however, evolved gradually during the course of time, mainly Early Historic period in India. In this paper we will trace the origin of the caste system and its expansion and how it became so extensively followed and its implications and relevance in today's world.

ORIGIN AND EXPANSION OF CASTE SYSTEM

There are a number of theories regarding the origin of the caste system in India. The first is the colour theory according to which Aryans, who said to have come from outside India and were fair skinned, sharp featured people. On the other hand, indigenous people of India who were dark skinned and flat nosed were despised by the Aryans and are named *Dasas/ Dasyus*. They were then pushed towards the South Indian subcontinent. These *Dasas/Dasyus* are known in the Rig Veda as the aborigines, independent of Aryans but as conquered slaves who later came to be assimilated in the *Varna* system as *Sudras*.

The second theory, is said to be stated in the Rigveda's 10th chapter (*Mandala*) under the *Purushsukta* hymn. The hymn States that during the ancient period there was a sacrifice conducted by *Prajapati*. As a consequence of this sacrifice the four *Varnas* came to life. It is said that out of the head of lord Brahma were born the Brahmanas, out of his shoulders were born the *Kshatriyas*, out of his thighs were born the *Vaishyas* and out of his feet were born the *Shudras*. For a very long time the hereditary occupation was not a principle to reckon with.

Thirdly, the *Varna* came to be identified on the basis of occupation of a person. Thus, there could have been people of more than one *varna* in a single family. With the increase in the number of occupations the caste system began to extend.

In the 3rd century, there was the rise of the fifth *Varna* known as *Panchamas*, who were regarded as the untouchables known by different names like *Chandallas*, *Nishadas*, *Shabaras* etc. (Pg. 264, Vedic Age). They were further classified into *Nirvasita* and *Anirvasita*. *Nirvasita* were the one's who lived outside the settlements and *Anirvasitas* were the one's who lived on the shady and dirty outskirts of the villages.

Inter- *Varna* marriages made caste even more complex. There were various kinds of marriage systems in ancient times within the *Varna* and outside the *Varna*. Within the *Varna* had societal acceptance, however, marriage outside the *Varna* was not acceptable. Inter-*Varna* Marriages were known as *Anuloma* (in the direction of body hair i.e. when the boy belongs to the higher *Varna* and the girl belongs to the lower *Varna*) and *Pratiloma* marriages (in the opposite direction of body hair i.e. when the girl belongs to higher *Varna* and the boy belongs to lower *Varna*). The offspring born out of such marriages were kept in different groups. The offspring born out of *Anuloma* marriages were accepted in the *Varna* order, however, the offspring born out of *Pratiloma* marriages were despised. Later, this system of gradation gave rise to the class of *Panchamas*, the untouchables. Expansion of caste took place even when the foreigners got married to indigenous population.

A number of new castes emerged like *Kayasthas*, who were the offsprings of *kshatriya* male and *Sudra* female and were acceptable in the *varna* order; *Chandallas*, offsprings of *Sudra* male and *Brahmin* female and were kept outside the *Varna* order and despised as the untouchables (*Panchamas*).



Consequently, the offspring started to adopt the occupation of his parent and thus, the *Varna* came to be identified on the basis of a person's birth and it came to be known by the name of *Jaati* (*jaati* came from the word *jataka* which means a newborn). Gradually, it became the way of life and shaped the environment around these people.

There is approximately 25% of Indian population which comes under SC and ST categories and which are historically disadvantaged group. Marriage also remain a key factor for maintaining caste boundaries. Studies show that only around 5-6 % of marriage in India are inter-caste, reflecting strong social closure.

During the British colonial period these hierarchies further materialized through administrative agencies like Census classification and legal gradation. According to Nicholas B. Dirks, colonial governance did not create caste but transformed it into a rigid and bureaucratically managed system, thereby embedding it more deeply into institutional framework. (Dirks, N. B., *Castes of mind: colonialism and the making of modern India* 2001). Castes has been identified and registered on paper which earlier was followed with no written documentation. Each and every caste was mentioned as scheduled in 1935 under the Government of India Act 1935.

Under this Act the lowest categories in Hindu caste system were listed in a schedule for the purpose of statutory safeguard and political participation. This was further strengthened with the Government of India Scheduled Castes order 1936 and replaced “Depressed classes” with the “Scheduled Castes.” This later became the base for adoption of Scheduled castes in Indian Constitution by Dr. B. R. Ambedkar. Meanwhile, Poona Pact was signed in 1932 between Mahatma Gandhi and Dr. B. R. Ambedkar, through which the depressed classes were given their separate electorates increasing their political representation. This was a revolutionary step in Dalit politics and their recognition in power equations. However, it later was replaced with reserved seats in joint electorates.

Before this the British used the term “Depressed Classes” in 1921 census, and “Exterior Classes” in 1931 to classify the marginalized communities.

As a result of all the above discriminatory and gradation system, Dr. B. R. Ambedkar has incorporated safeguards in the Indian constitution regarding caste and other forms of disparities in the society and made them fundamental rights of an individual. Government of India also adopted various affirmative action policies among various domains which aimed at reduction of mainly caste, religion and sex- based inequalities, yet this discrimination has not faded out even a little especially in the countrysides, where people know each other more by caste identity than as a human.

During the centuries, caste has evolved from a traditional overt system into a subtle system of gradation in society and consequently, it became a system of institutional inequality. It spread from labour market to educational system and political governance and continues to shape contemporary Indian society and social fabric of institutions. It operates as a system where hierarchical distinctions are maintained through social norms, endogamy and unequal access to resources.

However, it did not remain static but became dynamically embedded in modern institutional framework making lower classes struggle with their identities. Thus, some protection was needed to safeguard their social and institutional rights. Due to such safeguards, enrollments in primary levels improved, however, dropout rates increased significantly at higher levels of education, especially among marginalized communities. (Desai and Kulkarni, *Gender and Caste disparities in education*, 2018). A number of students drop-out of higher education due to caste inequality.

The discrimination has percolated down from centuries and it became a way of life in all kinds of social, political and educational system. Inequality became embedded in the organizational structure and became socially accepted as if it is normal. It did not change with the policies and safeguards created by the government like constitutional measures, laws of equality, reservation policies etc. and continued with the oppression of lower classes. Every institution has inherited this as they were all already existent, and deeply rooted in the social history which was made worse by social attitudes, unequal access to resources like education and participation of lower social classes in leadership roles. It became even gross when bias started operating through merit, networks and culture and reproduce as it continues through generations.

Moreover, the policies and laws are not implemented strongly enough so to curb the dominance of higher classes. Already underprivileged, the socially inferior classes as they are proclaimed has to go through the subtle bias in higher educational institutions without notice. They became the victim of academic favouritism. Gradually, this inequality became so acceptable that it starts feeling normal and deserved in formal organizational structures, which continued even after independence. As a result, caste-based exclusion became socially legitimate, forming the platform on which the institutional practices are later created for graded inequality. This is an outcome of historical development created by politically motivated divide and rule system of British.



Constitution has provided a number of safeguards under article 14 (equality before law and equal protection of laws), 15 (Prohibits discrimination on grounds of religion, race, caste, sex or place of birth), 16 (Equality of opportunity in public employment), 17 (Abolition of Untouchability (directly targets caste-based institutional inequality)) and 21 (right to life and dignity) expanded through judicial interpretation.

In 1976, Equal remuneration Act was passed to ensure equal pay for equal work irrespective of gender.

In 1989 Schedule caste and Scheduled Tribes (Prevention of atrocities) Act was passed and made caste-based discrimination as a criminal offence. It also recognized institutional bias as a punishable offence.

In 1995, Article 16 (4A) was induced in the constitution through 77th constitutional amendment act which allows state to provide reservation of SCs and STs in the promotions if they are not adequately represented in public services. This article was further given strength by various other Constitutional amendment acts like 81st (yr. 2000), 82nd (yr. 2000) and 85th (yr. 2001).

In addition to this, Right of children to free and compulsory Education Act was passed in 2009 to guarantee free education to all children between 6-14 years of age including the disadvantaged groups.

Many such acts and judgements were passed after independence to deal with the issues of discrimination on various grounds like gender inequality, caste based discrimination, religion, regional discrimination etc. but still forms of discrimination and institutional inequality persists because of weak enforcement mechanism, social stigma, bureaucratic bias and lack of reported cases.

Thus, in 2026, a special arrangement was proposed by University Grants Commission (UGC) by issuing a notification on 13 January 2026 under the title UGC (Promotion of Equity in Higher Education Institutions) Regulation 2026. However, it was put on the hold by the Supreme Court of India just weeks after its notification and 2012 regulation are in effect whereas 2026 notification is temporarily suspended.

CONCLUSION

Caste has become rigid and esoteric in the post-colonial era. The complexity in the caste-based discrimination has led to various serious issues in the social life of downtrodden. Thus, there is a need to look at it in a different light as to what can make caste disappear from social life in general as said by Dr. B. R. Ambedkar. After much ponderance it has been identified that the caste has deeply rooted in Indian society. While legal and policy interventions have addressed explicit forms of discrimination, they have not demolished the structural platform and mechanism through which inequality is reproduced. For understanding and annihilating the institutional bias one has to shift from viewing it as individual prejudice to recognize it as an embedded feature of social and organizational systems. An organized movement of the deprived classes with achieving higher education along with more participation in Politics and policy making can make some difference. Consistent monitoring of Govt funds and policies should be done to minimize any loose ends. There should be a continuous tracking of funds till they reach the lowest level of beneficiaries. It is not possible to have social and economic democracy without achieving political representation. Thus, there is a need to highlight the need of structural and transformative approaches to achieve the equality that we are seeking for social inclusion of the marginalized groups.

Ultimately, as envisioned by Dr. B. R. Ambedkar, the annihilation of caste demands not only legal reform but also deep social transformation alongside political emancipation.

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