The Evolution of the Caste System in India: Historical Roots, Social Hierarchies, and Socio-Economic Effects

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Abstract

The caste system in India represents one of the most deeply entrenched forms of social stratification, evolving from the early Vedic period's functional division of labour into a rigid, hereditary hierarchy that shaped the country's socio-economic and cultural life. Rooted in religious texts and sustained by ritual practices, it institutionalized inequality, relegating marginalized communities to systemic exclusion from education, property, and dignified occupations, while simultaneously concentrating power and privilege within the upper castes. Over centuries, caste determined access to resources, social mobility, and political influence, perpetuating poverty and oppression among Dalits and other backward classes. Though colonial interventions and modern reforms introduced limited opportunities, the system persisted in new forms. Post-independence, constitutional measures abolished untouchability and initiated affirmative action, yet caste-based disparities endure in employment, politics, and social life. This study critically examines the evolution of caste and its continuing socio-economic effects on Indian society.

Keywords: Caste System, Social Stratification, Dalit Marginalization, Socio-Economic Inequality, Affirmative Action

Introduction

The caste system, one of the most enduring and complex social structures in India, has shaped the socio-economic, political, and cultural fabric of the subcontinent for centuries. Originating in the early Vedic period as a relatively flexible division of labour based on functional roles, it gradually solidified into a rigid, hereditary hierarchy with the formulation of Dharmashastras and Manusmriti, thereby institutionalizing the principles of purity, pollution, and social stratification. Over time, this system not only entrenched Brahminical hegemony but also marginalized vast sections of society, particularly the Dalits and lower castes, by excluding them from education, property rights, temple entry, and dignified occupations, relegating them to menial and stigmatized labour. During the medieval period, caste-based identities became deeply entrenched in religious rituals and social customs, reinforcing inequalities, while the colonial administration, through the census and codification of communities, further hardened these divisions, even as modern education and professions introduced by the British created avenues for limited social mobility. Post-independence, the Indian Constitution legally abolished untouchability and introduced safeguards such as reservations in education, employment, and politics to redress
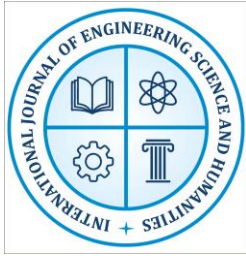
historical injustices; yet, the persistence of caste in marriage practices, electoral politics, and everyday social interactions demonstrates its deep-rooted influence. Socio-economically, caste has functioned both as a system of exploitation and as a barrier to progress: it restricted occupational mobility, perpetuated poverty among marginalized groups, and enforced social exclusion, while also dictating access to resources, land, and opportunities. For women, caste compounded gender-based discrimination, subjecting them to a double burden of subjugation. In modern India, urbanization, industrialization, and Dalit movements have challenged caste hierarchies, fostering greater awareness and assertion of rights, but caste-based violence, discrimination, and inequalities continue to persist, albeit in new forms. Thus, the evolution of the caste system reflects a historical continuum of control and resistance, oppression and empowerment, tradition and transformation. Studying its trajectory and its socio-economic implications remains crucial, as caste is not merely a historical phenomenon but an ongoing reality that continues to shape identity, power relations, and opportunities in contemporary Indian society.

Definition of Caste System (Varna and Jati)

The caste system, a unique and complex social institution in India, refers to a hierarchical form of social organization that classifies individuals into fixed groups based on birth, occupation, and social status, and regulates nearly every aspect of life including marriage, profession, and community relations. Broadly, the system is conceptualized through two interrelated categories—**varna** and **jati.** The term *varna*, derived from Sanskrit meaning "color" or "category," denotes the fourfold theoretical division of society described in ancient Vedic texts: Brahmins (priests and scholars), Kshatriyas (warriors and rulers), Vaishyas (traders and agriculturists), and Shudras (servants and laborers). This varna scheme was primarily ideological, outlining duties (*dharma*) and responsibilities for each group, and was later reinforced through religious texts such as the *Manusmriti*. Complementing this broader framework is the concept of *jati*, which refers to the thousands of localized, endogamous groups or sub-castes based on hereditary occupation, kinship, and region. While *varna* represents an abstract, pan-Indian ideal of social order, *jati* embodies the lived reality of caste, as it determined daily social interactions, ritual practices, and occupational roles within specific communities. Together, *varna* and *jati* institutionalized the principles of hierarchy, purity, and pollution, placing the so-called "untouchables" or Dalits outside the varna system altogether and condemning them to social exclusion and stigmatized labour. Unlike class, which is largely based on economic factors and allows for mobility, caste is rigid, hereditary, and sanctioned by religious ideology, making it one of the most enduring systems of stratification. Over time, the caste system became a pervasive mechanism of social control, dictating marriage alliances through endogamy, governing access to resources, and ensuring the dominance of upper castes in
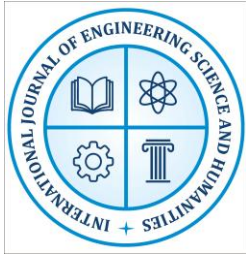
political, religious, and economic spheres. Scholars such as G.S. Ghurye, Louis Dumont, and B.R. Ambedkar have variously defined caste as a system of social stratification characterized by segmental division, hereditary membership, restrictions on commensality, hierarchy, and the monopoly of privileges by the few. Thus, the caste system can be understood not merely as a division of labour but, as Ambedkar emphasized, a "division of labourers" wherein human beings were reduced to fixed social categories, perpetuating inequality and discrimination across generations.

## Historical Evolution of the Caste System

- **Early Vedic Period**

In the early Vedic period (1500–1000 BCE), society was primarily organized on the basis of occupation and function rather than rigid hereditary divisions. The concept of *varna*, meaning "color" or "category," emerged as a broad framework that divided society into four groups: Brahmins (priests), Kshatriyas (warriors), Vaishyas (farmers and traders), and Shudras (laborers). However, in this era, these divisions were relatively fluid, allowing for occupational mobility and interdependence among groups. The *Rigveda* reflects a social order in which the distinctions were more functional than hierarchical, and purity-pollution concepts were not as rigidly enforced. Social mobility was possible, and individuals could change occupations depending on circumstances. Thus, caste in this phase was more of a socio-economic arrangement than a rigid religiously sanctioned system.

- **Later Vedic Period**

By the Later Vedic period (1000–500 BCE), the caste system began to crystallize into a hereditary and rigid hierarchy. The composition of texts like the *Dharmashastras*, particularly the *Manusmriti*, codified caste duties and privileges, prescribing strict rules of purity, endogamy, and social conduct. The principle of *varna dharma* was emphasized, with each caste bound to perform its hereditary occupation. Social divisions became more rigid as inter-dining and intermarriage were forbidden, and penalties were prescribed for violating caste boundaries. The notion of untouchability began to emerge, placing certain communities outside the *varna* framework altogether. The idea of ritual purity became central, with Brahmins placed at the top of the hierarchy as custodians of religious knowledge and Shudras relegated to servitude. This period marked the transformation of caste from a flexible occupational classification into a rigid, birth-based social order legitimized by religion.

- **Medieval Era**

During the medieval era, caste-based inequalities deepened further under the dominance of Brahminical ideology. The concept of ritual purity and pollution was entrenched, governing not only occupations but also social interactions, food habits, and access to temples. Untouchability became an institutionalized practice, with Dalits and other marginalized groups forced into
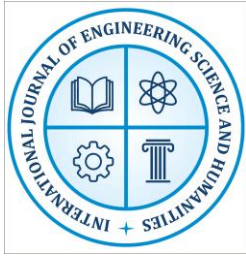
degrading and stigmatized labor such as manual scavenging and disposal of carcasses. This rigid order was challenged by several reformist and Bhakti movements, such as those led by Kabir, Ravidas, and Basavanna, which rejected caste distinctions and emphasized equality and devotion. Nevertheless, the structural inequalities persisted, and caste continued to dictate access to resources, education, and positions of power. Women, especially from lower castes, faced compounded oppression, both on account of gender and caste status. Thus, medieval India saw the entrenchment of caste as a social, economic, and religiously sanctioned order, with limited but significant voices of resistance.

- **Colonial Period**

The advent of British colonial rule brought significant changes to the caste system, simultaneously reinforcing and transforming it. The British administration, through decennial censuses and ethnographic surveys, classified Indian society rigidly into caste categories, freezing social identities that were earlier more fluid at the local level. This codification reinforced caste consciousness and often intensified divisions. At the same time, colonial policies introduced modern education, new professions, and urban employment, creating opportunities for some lower castes to move out of traditional occupations. Christian missionaries and reform movements also provided avenues of upliftment for marginalized groups. Thinkers such as Jyotirao Phule and later Dr. B.R. Ambedkar emerged during this era, critiquing caste oppression and advocating for social equality. Thus, the colonial period was marked by a paradox: while British policies hardened caste boundaries through administrative classification, they also created new socio-economic opportunities that sowed the seeds of anti-caste movements.

- **Post-Independence India**

With the independence of India in 1947, the newly framed Constitution, under the leadership of B.R. Ambedkar, sought to dismantle caste discrimination through legal and institutional measures. Untouchability was abolished under Article 17, and provisions were made for reservations in education, employment, and political representation for Scheduled Castes, Scheduled Tribes, and later Other Backward Classes. Affirmative action became a central tool to redress historical injustices and promote social mobility. Social reform movements and Dalit assertion gained momentum, with leaders and writers voicing the struggles and aspirations of marginalized groups. Despite these constitutional safeguards, caste continues to influence Indian society, evident in practices like caste-based marriages, political mobilization, and persistent social discrimination. The post-independence era thus represents both progress in terms of legal equality and the continuing challenge of eradicating caste-based inequalities from everyday life.

Role of Hindu Scriptures (Manusmriti and Dharmashastras)

Hindu scriptures such as the *Dharmashastras* and particularly the *Manusmriti* played a decisive role in codifying and legitimizing the caste system in India, transforming what may have
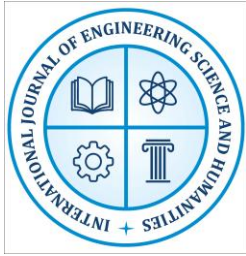
originated as a functional division of labour into a rigid, hereditary hierarchy sustained by religious sanction. The *Dharmashastras*, a body of texts composed between 500 BCE and 500 CE, provided detailed prescriptions on social conduct, duties of different varnas, and the principles of purity and pollution, thereby embedding caste distinctions into the moral and religious fabric of society. Among these, the *Manusmriti*—often described as the most authoritative—systematically articulated the roles and privileges of the four varnas: Brahmins, Kshatriyas, Vaishyas, and Shudras, and explicitly excluded the "untouchables" from the social order. It assigned the Brahmins supreme authority as custodians of knowledge and rituals, granting them social, spiritual, and material privileges, while confining Shudras to servile roles and denying them education, property rights, or access to sacred knowledge. The *Manusmriti* not only defined occupational duties but also institutionalized endogamy, prescribing strict rules against intermarriage and prescribing severe punishments for those who violated caste boundaries. The notions of ritual purity and pollution, emphasized in these texts, became the theological foundation for untouchability, as Dalits were considered impure and thus excluded from temples, wells, and public spaces. These scriptures also reinforced patriarchal norms by subordinating women within caste hierarchies, controlling their sexuality to preserve caste purity, and restricting their autonomy. By intertwining religion, law, and social practice, the *Dharmashastras* and *Manusmriti* provided ideological justification for caste-based exploitation and inequality, ensuring its endurance over centuries. Critics such as Dr. B.R. Ambedkar have described the *Manusmriti* as a charter of social slavery, arguing that its prescriptions created a rigid system that denied dignity and mobility to millions. While some later reformist traditions within Hinduism, such as the Bhakti movement, challenged these hierarchies, the enduring influence of these texts in shaping cultural attitudes and social practices cannot be overlooked. Thus, the role of Hindu scriptures in institutionalizing caste was central, as they provided the moral, religious, and legal authority that entrenched caste-based discrimination in Indian society.

Bhakti and Reformist Movements Questioning Caste Hierarchy

The Bhakti and reformist movements emerged as powerful countercurrents to the entrenched caste system, challenging Brahminical orthodoxy and offering alternative visions of social and spiritual equality. Beginning around the 7th century in South India with the Alvars and Nayanars, and later spreading across North India through saints like Kabir, Ravidas, Nanak, Mirabai, and Tukaram, the Bhakti movement rejected ritualism, priestly mediation, and the rigid stratification imposed by caste. Instead, it emphasized personal devotion (*bhakti*) to God, accessible to all irrespective of birth, caste, or gender. Saints like Kabir openly denounced Brahminical supremacy, proclaiming that true worth lay in spiritual purity, not caste lineage, while Ravidas, himself from a so-called "untouchable" caste, envisioned a casteless and egalitarian society in his poetry. Similarly, Guru Nanak, the founder of Sikhism, emphasized the equality of all human
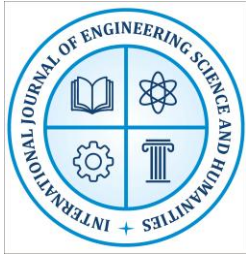
beings before God and rejected caste distinctions through practices like *langar* (community kitchen). These devotional traditions not only democratized religion but also provided a platform for marginalized voices to assert dignity and agency. Parallel to the Bhakti current, several social reformers in the 19th and 20th centuries—such as Jyotirao Phule, Swami Dayananda Saraswati, Mahatma Gandhi, and B.R. Ambedkar—took the critique of caste further, linking it with social justice, education, and political empowerment. Phule denounced Brahminical dominance in his works and emphasized the upliftment of women and lower castes through education. Dayananda Saraswati's Arya Samaj questioned caste restrictions and sought to return to a more egalitarian Vedic ideal. Gandhi campaigned against untouchability, calling the oppressed "Harijans," though his approach of reform from within the Hindu fold differed from Ambedkar's radical critique. Ambedkar rejected caste as a system of graded inequality and argued for its annihilation, ultimately embracing Buddhism as a path to liberation. Together, the Bhakti saints and reformist leaders undermined the theological and social foundations of caste, inspiring movements of resistance and sowing the seeds for modern struggles for equality. Though caste continues to persist, these movements created spaces of dissent and alternative moral visions, shaping the discourse of social reform and Dalit assertion in India.

Role of Social Reformers (Jyotirao Phule, B.R. Ambedkar, Mahatma Gandhi)

The role of social reformers in questioning and dismantling caste hierarchy has been central to the evolution of modern Indian society, with figures like Jyotirao Phule, B.R. Ambedkar, and Mahatma Gandhi shaping distinct yet interconnected approaches toward social justice. Jyotirao Phule, a pioneering reformer of the 19th century, attacked Brahminical dominance and exposed the exploitative foundations of the caste system through his works such as *Gulamgiri* (Slavery). He, along with his wife Savitribai Phule, championed education for women and marginalized communities, establishing schools for lower-caste children and girls, thus linking emancipation with access to knowledge. Phule laid the groundwork for anti-caste thought by asserting that social upliftment required dismantling caste-based privilege and empowering the oppressed. In the 20th century, B.R. Ambedkar took this struggle forward with a more radical and legal-political framework. Born into an "untouchable" caste, Ambedkar rose to become a jurist, economist, and the chief architect of the Indian Constitution. He condemned caste as a "system of graded inequality," demanded its annihilation, and worked to secure constitutional safeguards, reservations, and equal rights for Scheduled Castes and Tribes. Ambedkar's conversion to Buddhism in 1956, along with thousands of followers, was a symbolic rejection of Hindu caste orthodoxy and an assertion of dignity and self-respect. Mahatma Gandhi, though not a Dalit, also sought to reform caste practices, particularly untouchability, through his campaigns and constructive programs. He popularized the term "Harijan" (children of God) for the oppressed and promoted social integration through initiatives like temple entry movements and communal
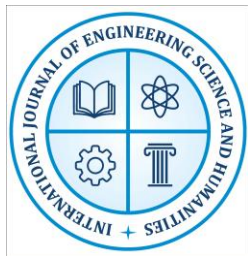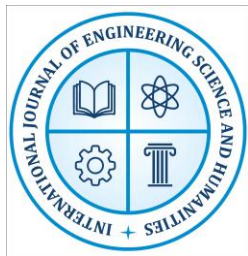
dining. However, Gandhi's approach emphasized reform within Hinduism and the preservation of the varna system in a modified form, which brought him into sharp ideological conflict with Ambedkar, who rejected caste altogether. Despite their differences, the efforts of these reformers converged in generating awareness, mobilizing marginalized groups, and placing caste oppression at the center of India's socio-political discourse. Their struggles laid the foundation for affirmative action policies, Dalit assertion movements, and the ongoing pursuit of social equality in independent India.

Conclusion

The evolution of the caste system in India reflects a long historical journey from a flexible occupational division in the early Vedic period to a rigid hereditary hierarchy legitimized by religious texts such as the *Manusmriti* and *Dharmashastras*, entrenched further during the medieval period through Brahminical dominance and untouchability, and reshaped under colonial rule through census classifications and modern education. Its socio-economic effects have been profound, as caste dictated access to resources, knowledge, occupations, and social status, systematically excluding Dalits and marginalized groups from opportunities for dignity and mobility. Women, particularly from oppressed castes, suffered a dual burden of gender and caste-based discrimination. While the colonial era paradoxically hardened caste identities and simultaneously opened avenues for reform, the post-independence Indian Constitution, under the leadership of B.R. Ambedkar, sought to abolish untouchability and implement safeguards such as reservations to address historical injustices. Despite these legal measures and the powerful critiques offered by reformers like Phule, Gandhi, and Ambedkar, caste continues to persist in new forms, evident in social practices, electoral politics, and continuing inequalities in education, employment, and land ownership. The resilience of caste demonstrates that it is not only a historical phenomenon but also a contemporary reality shaping identity, power relations, and economic opportunities in India. At the same time, the rise of Dalit literature, assertion movements, and urbanization has challenged its oppressive foundations and provided marginalized communities with new tools for resistance and empowerment. The study of caste, therefore, is not merely an examination of the past but a necessary engagement with ongoing struggles for social justice, equality, and human dignity. Understanding its evolution and socio-economic consequences highlights both the enduring challenges and the transformative potential of resistance in building a more inclusive and egalitarian society.

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