



COMPLEXITY OF VARNA AND JĀTI:

A Relook at the Indian Caste System

Anil Kumar

Assistant Professor of Sociology
Department of Law, School of Legal Studies
Central University of Kashmir, Nowgam Campus, Srinagar, India

Abstract: This paper examines the complexity of the interconnection of varna and caste systems in Indian society. It reflects the complexities of the traditions of different caste groups and the system that regulates their relationship with each other. It will also reflect on the modes where they turn slightly flexible and become harshly rigid. The concept of community no longer exists. However, it is a stronger claim but is made while stressing the importance of the social *Purushārtha Sādhana*. Both terms (caste and varna) are used interchangeably. However, a question regarding their meaning would need an entire book to be written. Both words are too ambiguous, especially for non-Indians or non-Hindus, though everyone, including Hindus and Indians, may find it challenging to distinguish between them.

Index Terms – Caste, Indian society, Sociological study, Varna system.

INTRODUCTION

Indian society is complex comprising races and a variety of cultures. People from different backgrounds came to India and settled, irrespective of the challenging terrain. Ultimately, India's society is a mixture of different races and origins. It draws a sub-continent of India. There are diversities of creeds, customs and castes. Still, people could live together and form stability in life. In Durkheimian understanding (1997), it is a sort of organic arrangement where people are united while advancing in their society. Moreover, it applies to people's colour, caste and religious beliefs, making India a "multi-cultural, multi-ethnic and multi-religious society". There has been a history of numerous attacks and conflicts in India. It disturbed the *Purushārtha* striving social fabric of the country. The focus remained on the equilibrium of the *Artha* and *Kāma* only, which destroyed many fundamental facets of Indian society and caused a massive reorganisation. The advantages of society in India have been diminishing while disadvantages were proliferating and creating an altered reputation. Deeper fault lines have formed. Sometimes, we try to blame modernity, whereas it naturally infiltrated society. Another stress is given to the existence of individuality. The essential entities that still govern a person's life are no longer the community of *Jāti* or *Kula*. Communities have become weaker, but people are more assertive, creating a much higher dynamic. The dynamic of *Srishti* is exceptionally high due to modernity's emphasis on change, progress, and development as autonomous values. The ability of the ancient institutions to control this dynamic through communal life was their strength. Weaker groups coexist with stronger individuals in our modern environment. As a result, *Srishti*'s dynamic will continue to be quite strong for a considerable time. It is the responsibility of man to realise the positive presence of other men. The true *Purushārtha* does not only mean to make an individual life better but to value that "Man lives in the society and fulfils the needs of his fellow beings" (Kumar, 2013).

TRACING THE GENESIS

Many scholars have discussed caste's nature, origin and function in Indian society. However, there is hardly any literature to refer to the complexity except in the studies by M. N. Srinivas (1962) and S. C. Dube (1992). According to Srinivas, the concept of the Varna system has deeply influenced "the ethnographic reality of caste". He argues that "Varna provides models for imitation of different jātis". A layman is unaware of the complexities of Varna and Jāti. He understands Varna as a clear division of society into four different orders, determined by *svabhāv* (nature) and *guna* (quality) of the people. The four orders consist of Brahmana, Kshatriya, Vaishya and Shudra, and their respective social duties: "The Brahmanas provide education and spiritual leadership, determining the vision and values of any society... The Kshatriyas are the nobility, the protectors of society and are expected to display the considerable strength of body and character... The Vaishyas are the productive class... The Shudras are the only section of society who were to accept employment offered by the other Varnas which are occupationally and financially self-sufficient" (Kumar, 2015). One of India's most contentious phenomena, the Varna system, is plagued by numerous problems. However, a closer examination reveals that the

fundamental purpose of this system was to guarantee a healthy and flexible society, as opposed to the restrictive society those colonial misinterpretations and mistreatment of varnas produced, giving rise to the castes that exist in modern-day India. The original varna system was extremely adaptable; unlike what is frequently believed, one's Varna could be adjusted based on one's skill. The British colonisation of India in the 18th and 19th centuries is what transformed the varna system into the current rigid caste structure.

Concepts that are mistakenly conflated as being synonymous are Varna and Caste. However, they are unrelated to one another. Their literal meanings are different, demonstrating how Jāti originated from the Sanskrit root "Jaha," which means "to be born." Caste so refers to birth. Varna, on the other hand, implies choosing or selecting. In this sense, caste is set at birth, whereas a person gains Varna following his nature. The fundamentals of caste and Varna are birth and aptitude, respectively. Therefore, while Varna is based on action, caste is based on birth. An uneducated Brahman is revered in the caste system, but an educated Shudra is despised. According to the Varna System, a Brahmana is only appreciated if he has learned something and shares it with others. According to an eminent Indologist, Pāndurang Vāman Kāṇe, the concept of Varna primarily places stress on a person's moral character and mental capacity. The caste system emphasises birth rights and the prestige they bring with them. Caste is a rigid system, but the Varna System is flexible.

- 1) The Varna system was adaptable and dynamic. There are several instances of inter- and intra-varna marriages changing throughout the Vedic period and even after. By birth and by deed, Vishvamitra became a Kshatriya. When Indra experienced the same event, Devaki, Sidhudip, and Vithavya becoming Brahmans are mentioned in the Mahabharata, and the Bhagwat Purana also contains instances when this has happened. The low-born Vyas and Vaishya Vashistha becoming Brahmans are mentioned in the Padma Purana. The Mahabharata includes numerous examples of inter-Varna marriages. While Dushyant married Shakuntala, Kshatriya king Yayati wed the Brahman Devayani. Despite being a Kshatriya, Shantanu wed a Satyavati of humble birth (Kāṇe, 1968).
- 2) The number of Varna and caste differ significantly. Castes number many, whereas there are only four Varnas. The significance of the 10th mantra of the Rig Veda is that Brahmans perform the function of the tongue in imparting knowledge. Because he guards society, the Kshatriya is like the arms; Vaishya is like the abdomen and thighs; the Shudra is like the feet. There were four Varnas as a result. On the other hand, there is an estimate of 3000 castes and 25000 sub-castes in India.
- 3) The basic word "Jana," which denotes birth, is where the term "caste" or "Jati" comes from. Caste is therefore affected by birth. The word "Varna," which literally means "colour," comes from the word "Vri," which refers to one's choice of profession. Therefore, Varna is concerned with a person's profession or colour.
- 4) The members of a caste are subject to several limitations. However, the Varna system is devoid of political and socioeconomic obstacles.
- 5) Caste has less mobility and is based on rigorous rules. Although it is a closed stratification, mobility patterns within the Varna system are more tolerant. It is based individual's aptitude and expertise. Whereas traditionally, caste lacks in the choice of occupation (Ghurye, 1932).
- 6) The relationship between caste and class is not always favourable; placement may vary depending on a group's economic, political, or educational position. Nevertheless, the Varna-class correlation is generally favourable.

FROM THE FIELD

In order to test the knowledge of the texts, I addressed a few questions to people and collected some intriguing responses. On asking about the generalised view of the caste system in India, a learned fellow believed that hierarchical order is a pattern of the universe, and there are hierarchies from the lowest coating to the highest. They thought that throughout human history, there had been no phase without a hierarchy, be it colour, gender, work, etc. One fellow believed that the caste system had been the basic foundation of India being a caste-based nation. It was as long as it was based on acquired status. However, as time passed, it got diluted with the improper concept of ascribed status and resulted in what we see today as inequalities and discrimination in various conditions.

Furthermore, we are not fighting to eradicate the caste system but rather an inequality based on it. Moreover, if one has to take it up, it seems a Herculean task to root the caste system out of Indian society. Another response I collected was that caste is an inhumane system and has no basis in science. They claimed that a person's intelligence, nature, and characteristics are not inherited from their ancestors. They further argued that all traits are specific to individuals. To generalise and say that all people from 'X' social groups share similar characteristics is bigoted.

Another amusing yet thought-provoking response I collected was: "If you are about to die and need blood to survive, you will not care about what Caste/Religion/Race/Gender it came from. So why do you care about it now?" One of my fellow scholars from New Delhi believed that the caste system has been in India since ancient times, and it is entirely okay unless we start to discriminate based on it. They further expressed that every individual has specific specialisations, and castes try to amplify those specialisations. "Hence there is no problem with the caste system. The real problem lies in our minds." Another response I received was that "in ancient India, caste system used to segregate people based on their occupation. However, in modern India, people tend to discriminate on the basis of caste, which is nothing but the occupation pursued by their ancestors."

Exclusively talking to a person from the Brahmin caste group; asking him about his varna, he replied, “nowadays, it is complicated to relate a person to his varna as there are no such limitations as existed in the past. No restrictions can confine him to a particular varna. I could say that people staying in the temple (priests) can only relate to their particular varna because the majority of them perform the same task.” He said, “there are many cases which contrast to the element of varna.” He added that “now (Brahmin) young generations, in many areas join service sector...people from different castes do not know which varna gains spiritual upliftment and who becomes a priest (or a *pandit*).” It makes it clear that now the reference to the varna model is rarely given anywhere in society, and what is more focused and followed is the caste model.

Defining caste is more complicated than giving the derivation of this term. Each one of the caste groups has a particular name by which it is called. Several small aggregates are grouped under a common name while these large groups, but subdivisions of groups, are still more extensive and have independent names. The words castes and sub-castes are not absolute but comparative in signification (Hutton, 1963). A group is a caste or sub-caste compared to being larger or smaller. For example, within Hindu society, Brahmin is varna as well as caste. Within the larger ambit of Brahmins, there are several names like Chaturvedi, Trivedi, Dwivedi, Bedi, etc. When we talk about Maratha Brahmins and Konkan Brahmins, the first would be a caste, and the latter would be a sub-caste. In north India, Sharma is another popular Brahmin sub-caste. Many sociologists argue that sub-caste is the real caste. For example, G. S. Ghurye (1932) asserted that referring to members within a caste, sub-caste is more meaningful and referring to members of other castes, sub-caste is the crucial point of recognition. As, in practice among Hindus, we understand that there is sub-caste exogamy while, at the same time, there is caste endogamy. It means a person marries within their caste but not within their sub-caste.

One of the most complex and complicated features of the caste system is the ‘segmental division’. The members in a caste group are unlike class groupings or voluntary associations. Membership in a caste group is determined by birth and not by choice. Ghurye restricts himself “to the Marathi region, a person is born either a Brahmin, Prabhu, Marāthā, Vāni, Sonār, Sutār, Bhandāri, Chāmbhār, or a Mahār, etc. If he chances to take a vocation which is not earmarked for a particular caste—say the military—he remains a casteman all the same.” There is also one more complex element of marriage among Hindus, particularly that two people sharing the same *gotra* or parental lineage cannot marry each other. In contrast, it does not apply to Muslim societies even if they practice a caste system. Elucidating the response of a Kashmiri Muslim person conveys that “there are no grave restrictions about marrying outside caste.” He said, “we give our daughters and sisters to other castes as well, including the lower castes.” Another person, a cook by profession (a *Wāza*), said they never marry their daughters in lower castes like *Hānji*, *Wātal*, etc. He also made clear that if they may marry their males outside caste, even lower ones, but they do not give daughters to lower castes.

Furthermore, strict prohibitions are announced by the Muslim upper castes in Kashmir since they consider themselves religious castes like *Syed*, *Qureshi*, *Peer*, *Jeelāni*, etc. They strictly marry within their caste. A Hindu respondent claimed that “now caste is not focused much while marriages but what is taken care that the *gotra* of the two people should not be same.” He also highlighted the term *pind-daan*, saying it is a feast Hindus offer their ancestors who have died. This feast is offered in the month of *pitrapaksh*, and those who offer *pind* to the same ancestors cannot marry each other.

IS RESERVATION TO LOWER AN INJUSTICE TO UPPER CASTE?

Primarily reservation in India is given based on caste or economic status. Different states in India have different types of reservation quotas for citizens. For example, in the state of Jammu and Kashmir, there are different reservation categories like RBA (resident of the backward area), SC (scheduled caste), ST (scheduled tribes), OSC (other social castes who are poor and underprivileged classes), ALC (actual line of control) and so on. More than 50% of seats for educational and job opportunities in the government sectors are reserved for those who come under these categories. Whether it is an injustice to the open merit candidates is the concern. Indian constitution has guaranteed equality for every citizen. The reason is that, in contrast, the reservation Act of the same constitution divides the educational and job opportunities for citizens based on caste, region, class and other aspects. The people who belong to the RBA category are given reservations for the fact that these people live in far-flung areas; hence they do not have the same resources to learn as compared to the people living in urban areas.

Nevertheless, we have seen that people from these places move to cities and other places where they can access resources as much as any city resident. Still, they carry the address proof of their native place to avail any benefit in showing that they belong to a far-off area. This sort of situation provokes the competitors to speak against the reservation. Moreover, it is considered an instance of injustice towards the citizens in the open category.

Reservations are intended to bring classes back to the financial light and give them an equal status in society. About 99% of the population in the reserved category face social discrimination, and about 75% financially. Everyone should read and understand why reservations came about. Those who are not restricted or those of the upper class should be happy that they are not dealing with the same situations that lower class people have experienced, be it physical, mental, financial or social abuse. Everyone must learn how the upper castes, distinct from the upper class, oppress the lower castes and classes, which is happening in other parts of the world, even in this century. If a person asks their parents if they want to marry the daughter/son of a wealthy SC/ST/OBC community, they will ask a caste question and simultaneously enquire about social

class status. At first, such a reaction must stop. Until a typical mentality exists, the reservation has to be there. There is no comparison of class with caste.

Moreover, who is responsible for all this? We must not blame a class (lower or upper) or caste. We may blame the ancestral generations for creating the circumstances responsible for any form of inequality. The fact is that there are many low-income families in the upper castes and many high-income families among the lower castes, and the government provides them with support and other benefits regardless of caste category and only depending on their annual/family income. Caste itself is not a social threat, but a practice of discrimination is.

Furthermore, unequal treatment and discrimination can only be eliminated when all castes receive fair social treatment. Low-income and high-income groups can meet at a point where they see themselves on an equal platform. However, that platform remains ideal in the case of the caste system. The treatment of Dalit communities by the upper and dominant castes has been recorded and reflected in the history of humankind. Perhaps the question of justice emerges from the poor of the upper caste. They must realise that it is entirely different from the fundamental question. Reservation given to girls, for example, concerns the question of gender justice.

Saying that 50% of seats are reserved for various categories in any sector does not make competition easier for a specific community, whether transgender people, women, SC, ST or OBCs. It is not that the difficulty level of the test is less or more. Every candidate has to appear in the same. The reservation is not a benefit out of the box but rather an opportunity towards equity. It is about being fair with the entire society. The Constitution of India states that all are equal in the eyes of the law. There is equality for all, and education is the key to every success. Reservations for one category or another is not at all an unjust policy, but it depends on the primary purpose of its implementation. It is also essential to note that we are not done yet making society better in every form. The purpose of reservation is to empower and provide equal opportunities for development in education and jobs. The aim is not to promote one community over another but to bring them to the same level of competition. Reservation is a social concern and development of all. Therefore, it needs support from all communities irrespective of getting any reservations. However, the unemployed youth gets anxious and starts blaming the state's policies, which should not be the case. Not all the youth from oppressed castes are employed and get admission to the best educational institutions. In many instances, they are doubly and trebly marginalised. The reservation programme is not just for economic development and growth but also for social upliftment. In cases where the population of a particular region is given a reservation, what happens is that those people leave that region and still receive the benefits. How will this help improve the development of the region and the people who still live there? In such a case, the reservation benefit should be granted only to those still living there and not limited by their background.

CONCLUSION

The caste system is not a social evil but the practice of hierarchy within it. Every practice of creating social inequality takes the nation backwards. It acts as a powerful social and divisive political force in the country. Equal treatment of different castes is a solution to resolve communal tensions. *Equality* is the key that leads to social progress. Over time, India has grown liberal and harsh simultaneously in terms of caste. The flexibility is observable in the caste customs, and rigidity is also noticed in the unequal treatment of individuals and communities. There is a common argument that, in general, the urban people in India are less strict about the caste system than the rural ones. The cited reason is the intermingling of castes in cities, whereas discriminations and the practice of untouchability still exist in rural areas. One must differ with such a stand because there are occurrences of opposite instances throughout the country. In cities as well as in villages, there are incidents of violent clashes based on caste tensions. The government's reservation policies and justifications of positive discrimination have created new apprehensions in India. Such policies are seen as discrimination against the higher castes, so the conventional caste system discrimination has gone backstage.

The problem lies within the misunderstanding of caste and its contours. Caste is not class. It has a social basis utterly different from the division based on economic conditions. Modern Indian society also compares the two individual circumstances without looking at their separate fundamentals. Even people from lower caste communities who achieve higher financial status still fail to achieve social recognition. The story that education is the key to the future, allowing people to rise above the circumstances of birth and background, should ideally work in modern India, but it is not the case. In fact, children of cooks, gardeners, and sweepers fail to acquire a reputation after earning their degrees in science, engineering, medicine or business. There are claims that the last two decades of economic growth have fundamentally changed India, and discrimination on the bases of caste has been illegal for more than six decades. Still, we cannot negate that caste discrimination has been affecting the roots of higher and lower castes in India. Since its independence, India has faced many communist-led uprisings against discrimination based on caste. The uprising of Naxals in west Bengal in 1967 and Andhra in 1969 are some notable uprisings among them.

To sum up, caste as an essential characteristic of Indian society must not be ignored unless it is politicised. The caste identity of a person or a community defines the ascribed social membership and does not entail any hierarchism. Nevertheless, in the practice of caste, inequality is inherent in the form of hierarchy. The complexity of caste and varna remains upbeat because of the acknowledgement of the suitable ranking of people in society. The identity of being human

has been encouraged by various philosophic stands, but that remains an ideal. We want to achieve and prosper, for which the spirit of the superiority of an individual or a group over others must be dissolved.

ACKNOWLEDGEMENT

The present article is an outcome of the classroom discussions with my students in the course “Sociology of Indian Society” at the Central University of Kashmir. I thank all of them who raised queries and concerns regarding the complexity of the caste system in India and shared their experiences of the instances of caste hierarchy, particularly in Kashmir.

REFERENCES

- [1] Dube, S. C. (1992). *Indian Society*. National Book Trust, India.
- [2] Durkheim, E. (1997). *The Division of Labour in Society*. Trans. W. D. Halls, Intro. L. A. Coser. Free Press, New York.
- [3] Ghurye, G. S. (1932). *Caste and Race in India*. Popular Prakashan Pvt Ltd.
- [4] Hutton, J. H. (1963). *Caste in India: Its Nature, Function, and Origins*. Oxford University Press.
- [5] Kāṇḍe, P. V. (1968). *History of Dharmasāstra: (Ancient and Mediæval Religious and Civil Law in India)*. India: Bhandarkar Oriental Research Institute, India.
- [6] Kumar, A. (2013). Social Thinking to Scientific Social Theory: An Introduction to Sociology and Social Anthropology. *International Journal of Research in Sociology and Social Anthropology*, 1(1), 1-5.
- [7] Kumar, A. (2015). Varna-Jāti Interconnection: Some Reflections on Caste and Indian Tradition. *International Journal of Research in Social Sciences*, 5(3), 788-793.
- [8] Srinivas, M. N. (1962). *Caste in Modern India and Other Essays*. Asia Publishing House.

