

Understanding Social Equity¹
(Caste, Class and Gender Axis)
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This session attempts to familiarize the participants the significance of understanding the framework of social equity. In order to understand equity, one has to understand what the axes of inequities and inequalities are. Towards this it is important to:

- Understand the social structure and institutions;
- stratification and inequality on the basis of several parameters like caste, class and gender;
- how these stratifiers mediate differential access to social and household resources and create the ground to understand issues like equity, justice and rights

Most societies in known history had different forms of hierarchical social structuring on the basis of which property was held, labor was allocated, rewards/ remuneration varied and rules pertaining to marriage and social interaction existed. Institutions within society such as religion, polity, markets, family broadly reflected these hierarchies of privilege, deprivation and dependence. The understanding whether the religious and cultural context was the basis for the economic hierarchy or the economic or material was the basis for other institutions (base – superstructure) is a matter of perspective. Which preceded and which followed is a matter of debate. While one perspective on the existence of this structure deployed ‘functional’ explanations that (1) justify the existence of hierarchy as a system of ordained status or a reward for merit and (2) view the existence of certain hierarchies as contributing towards a particular function and therefore have a justification for their continuity. This view is known as the ‘Structural Functional’ approach.

The second well known approach is known as the ‘Marxist’ or the Conflict School which raises questions on the differential property holding, relations to the means of production,

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differential distribution of the fruits of production as the basis of exploitation and conflicts.

From equity, justice and rights perspective obviously differential access to resources, opportunities and entitlements on the basis of parameters like class, race, caste, gender, ethnicity, ability, age, sexual orientation are seen as unjust and unfair. An awareness of these hierarchies and discrimination and conscious attempts to reverse this discrimination would be understood as an Social Equity approach. While attempts to address inequalities and discrimination from a **equality perspective** assumes 'sameness' (for eg., making a particular position open to everybody to apply). On the other hand, equity perspective recognizes the existing difference between people (in terms of race or caste perspective) or between men and women in terms of their gender roles, relations and capacities and attempts to address the same by making special provisions for women. So 'affirmative action', 'protective discrimination' or 'reservations' fall in this category.

Equity has to be understood in terms of 'horizontal equity' and 'vertical equity'. Horizontal equity demands that equal resources and attention need to be given to men and women to access those resources which they need to realize their potential as human beings. On the other hand, vertical equity means that different needs of men and women (that may or may not stem from biological differences) need to be recognized and addressed in terms of equitable allocation of resources. Not making sufficient provisions constitutes an inequity which women face on a large scale. Horizontal and vertical equity issues intersect as well. For example, men and women have a need for sanitation facilities, but for women it is also linked not only to dignity but also protection against violence which shows their greater need for sanitation. Fulfilling these needs equally but differently will fulfill the horizontal and vertical equity requirements.

Equity is a means. Equality and equitable outcomes are the results. Gender equality is therefore the equal valuing by society of the similarities and the differences of men and women, and the roles they play. It is based on women and men being full partners in their home, their community and their society.

Brief Notes on the Concepts^a :

Understanding Caste

Marginalisation, exclusion and exploitation based on class, gender, race and ethnicity have been part of every society including the Indian society. But what is typical of India is the caste based exclusion and exploitation. Caste has been one of the most dominant and determining factors not only in social but also in economic and political spheres. It governs the mind set not only of the Hindus who constitute over 84 percent of Indian population but also of most of the Christians, Muslims, Sikhs and Buddhists as majority of the people in these religions are basically Hindu converts. Caste is based on graded inequality. The caste system ascribes positions within the social hierarchy based on birth (ascription), thereby perpetuating inter-generational upper, lower and out caste positions. The unequal and discriminatory social arrangements deny people of lower castes access to opportunities of educational and economic advancement, and with its strict adherence to endogamy and the notion of *purity and pollution*; it violates the rights of Dalits and their full enjoyment of Constitutional guarantees. The institution of caste perpetuates inequality, dominance and exploitation, and continues to deny opportunities of development to the lower castes (the Shudras and Ati-Shudras) who constitutes the major proportion of Hindu population.

The concept of caste is understood from diverse vantage points, and accordingly its origin and meaning, and its interpretations and justifications differ among scholars and social reformers. While some scholars justify its relevance as a divine, functional and cohesive institution, others, based on the field reality, consider it as the most harmful, coercive and divisive institution and argue for its annihilation.

The Concept of Class and Related Processes

Studies on 'social stratification' occupy a prominent place in sociology. Distribution of power, wealth and prestige in various societies has been the main concern not only of

[^] The content for these outlines has been drawn from the Foundation Course outlines of the TISS

sociologists but of a variety of thinkers from other disciplines. Economic relations and 'power' have been central to the stratification but the relationships between the two may lead to conflicting social groups. Their understanding has resulted in a range of studies divided widely across ideological and philosophical grounds.

The early phase of writings on 'social class' can broadly be divided into two polarized streams: the conservative approach (in Weberian tradition) where the concept of 'social class' is treated like other major concepts: occupation, income, life styles, ownership of property, positions of influence, etc. In contrast, the radicals (in Marxian tradition) have been impressed by the conflict between the classes of owners and workers.

In the post-Industrial Western society, a few important changes are visible in their social stratification, decentralising of their relationships, especially property and production based relationships; expanding middle class with fairly uniform life styles; declining role of militant unionism; class consciousness losing its collective identity and conflict; a shift in group formation; changes in socio-political cleavages; and new forms of civil action (feminist movements, human (and civil) rights movements etc.) have lead to an increasingly problematic nature of social inequalities and conflicts.

Understanding Gender

The concepts of 'sex' (which is understood as a biological category) and 'gender' (which is a social construction) help us analyze the way societies and their structures are gendered. Several social institutions like the family, education system, media, religion, legal system and so on contribute to the construction of gender and reinforce patriarchal values. Gender gets manifested through different kinds of controls on women – on their production, reproduction, sexuality and mobility.

Gender is embedded within other social stratifiers that mediate different outcomes for men and women. Women's position in the labor market, their health, educational opportunities and restrictions, social lives, entertainment and leisure all are implicated in the social construction of masculine and feminine sexuality. Gender inequality in sexual

relations between men and women reflect and serve to maintain subordination. Sexual orientation and preference affect people economically and socially for sexuality and sexual choice become the basis for exclusion, marginalization, and violence. Women's movements question the paradigms of development; broaden conceptualizations of family, markets, public/private, politics, and violence and question the narrowness of social movements and broaden the contours of knowledge building and dissemination.

Women and Water:

- Women and girls are primary collectors of water
- Limited access to water and sanitation is a critical health and safety problem for women and girls
- Access to water is mediated through access to land. Since women do not own land their rights to water is not recognized
- Decentralized participation efforts often do not accommodate women and resource poor groups
- Women's need for water is seen only in terms of domestic drinking water and not in terms of water for livestock and other micro-enterprises like horticulture or fisheries

Approaches to Integration of Women in the Water Sector

Approaches in paying cognizance to women range from an **efficiency approach** that attempts to prove that women are better managers of scarce resources and therefore the incorporation of women in water projects actually improves the efficiency of the project. This approach tends to co-opt women's cheap and unpaid labor for purposes of the project goals rather than changing the terms of gender relations. On the other hand, the **needs approach** attempts to highlight women's special need for water as primary users of water for domestic use. While this approach creates space for women in the irrigation sector, it does not challenge rights to water linked to property holding and also does not challenge the gender relations and roles. The **equity approach** extols women's rights over water independent of ownership of property or the need they have. The actualization

of the equity approach is feasible if the water sector can be restructured on sustainable, equitable and participative lines (Kulkarni, et.al. 2005).

Broad Questions to capture Gender Dimensions

The set of questions should help you understand the context from a gender and social equity perspective- who does what? who gets what and why? what is gender division of labour? What is the control of resources and bargaining position of women and socially disadvantaged groups? How are public resources distributed between different groups? What is the process of inclusion and exclusion in decision making?

As a starting point to capture the different contributions of men and women and different implications to men and women due a particular program, initiative or intervention, you could examine: (drawn from Kulkarni, et. al 2005: 11).

- How do women and men use water resources and for what purposes?
- How are the contributions (labor, time, payments in cash and kind) to the development and management of water resources divided between women and men, rich and poor, socially included and excluded communities?
- Who makes decisions about water use and management at various levels? (households, communities, panchayats, blocks, districts, water committees and so on)
- Who benefits from projects and program resources?
- Who bears the costs of a new project or program often disproportionately? (in terms of work load increase, reduction in leisure, declines in health, income and so on).
- Do women and men from different socio-economic, religious and ethnic groups benefit equitably?

The list is not exhaustive but indicative.