ISSN - 2347-7075
Impact Factor - 8.141

INTERNATIONAL JOURNAL OF ADVANCE AND APPLIED RESEARCH

Double-Blind Peer Reviewed / Bi-Monthly / Referred / Open Access Research Journal



Vol. 7 No. 50
September - October - 2026

Young Researcher Association

International Journal of Advance and Applied Research

(IJAAR)

A Multidisciplinary International Level Referred and Peer Reviewed Journal

ISSN–2347-7075 **Impact Factor–8.141**

September - October - 2026

Volume - 7 Issue – 50

Published by:
Young Researcher Association, Kolhapur, Maharashtra, India
Website: *https://ijaar.co.in*
Submit Your Research Paper on Email
Regular Issue: editor@ijaar.co.in
For Publication Call On - **8624946865**

K.L.E. SOCIETY'S

S.V.S. BELLUBBI ARTS & COMMERCE COLLEGE,

SAUNDATTI – 591126. DISTRICT: BELAGAVI. KARNATAKA STATE

(Accredited 'A' Grade by NAAC in 4th Cycle)

Editorial Board

Editor - in- Chief

Dr. N. A. Koujageri

Members of Editorial Board

Dr. Geeta Mallapur

Shri. M.C. Hadimani

Shri. M.N. Sangolli

Shri. P.F. Hadimani

The Editors shall not be responsible for the originality and thought expressed in the papers. The author shall be solely held responsible for the originality and thoughts expressed in their papers.

© All rights reserved with the Research paper's authors

INTERNATIONAL JOURNAL OF ADVANCE AND APPLIED RESEARCH
ISSN – 2347 -7075 (DOUBLE-BLIND Peer Reviewed) (Bi-Monthly Research Journal)
Vol. 7 No. 50
September - October – 2026

TABLE OF CONTENT

Sr. No.	Name of Author	Title of Paper	Page No.
1	Dr. Ningappa Koujageri Dr. Anilkumar S. H.	Health Care Infrastructure and Employment Status Among Tribal Population in Karnataka	1 - 6
2	Dr. Husensab Nadaf	Skill Development for Youth Employability in India: A Study of Opportunities and Challenges	7 - 13
3	Mr. Shivanand Halolli Prof. D. N. Patil	Crop Insurance as a Financial Risk Management Tool: A Study of Farmers' Income and Livelihood in Belagavi District	14 - 22
4	Dr. Sukanya S. Nair	Inclusive Development in Kerala: Economic Participation and Barriers Faced by Women with Disabilities	23 - 30
5	Dr. Ajit Kadam Dr. Ningappa Koujageri	Comparative Study of India's Trade Competitiveness with Key Emerging Economies an Analytical Study	31 - 37
6	Shashikumar Totad Dr. Saraswati H. Bammanal	Sustainable Development and Rural–Urban Transformation in Karnataka, India	38 - 48
7	Dr. Kumar Y. Hanjagi	An Analysis of the Education-Employment Paradox in India: A Quantitative Perspective	49 - 55
8	Dr. Anilkumar Dr. R. V. Hegadal	Contemporary Challenges and Emerging Trends in the Indian Economy	56 - 69
9	Mr. Vinayak Madig	Indian Economy Transition: Contemporary Challenges, Emerging Issues and Future Prospects	70 - 78
10	Dr. Ramya M.	GST 2.0 and Income Tax Reforms: Towards a Modern and Efficient Tax System in India	79 - 84
11	Dr. Nagangouda Patil P Dr. Manjunath N. Lamani	Sustainable Development and Rural–Urban Transformation in India: A Political Economy Perspective	85 - 90
12	Vagesh Chavadi	Contemporary Challenges and Emerging Trends in the Indian Economy: A Comprehensive Structural Analysis	91 - 96
13	Chinmayi R. Hegadal	Digital Economy, Financial Inclusion and Technological Changes in Contemporary Indian Economy	97 - 108
14	Shri. M. C. Hadimani	Impact of Urbanisation on Rural Communities: Challenges, Opportunities and The Path Towards Sustainable Development	109 - 112
15	Dr. Nagaraja V.	Rethinking the Indian Past: Changing Approaches to History and Historiography	113 - 119
16	Bheemanagouda Shingnalli	The Economic Policy of Tipu Sultan	120 - 127
17	Dr. Shakuntala Ajjannavar	Contributions of Women of the Ratta Dynasty: A Study	128 - 135
18	K. S. Mahesha	The Educational Implications of Using AI –in Teaching	136 - 139
19	Dr. Babasab Tamadaddi	Historical Perspectives on Social and Economic Transformation	140 - 146
20	Shri. M. N. Sangolli	Understanding the Relationship Between the Past, The Present and The Community: A Historical Perspective	147 - 151

Sr. No.	Name of Author	Title of Paper	Page No.
21	Mangala Hiremath	The Impact of History, Heritage, Culture and Identity on Tourism in Dharwad District: A Study	152 - 155
22	Mr. Rangappa Dasar	Water Disputes and Agrarian Transformation: The Kalasa–Banduri Project in Historical Perspective	156 - 158
23	Santosh Kurubet	History, Heritage, Culture, and Identity: Rethinking Historical Memory and Cultural Preservation in Contemporary India	159 - 164
24	Vishwanath Ainapur Dr. L. P. Maruthi	Administrative Centers of Belagavi District During the British Era	165 - 168
25	Mallappa Bairappanavar	Historical Perspectives on Social and Economic Transformation through Veerashaiva–Lingayat Mathas in Dharwad District	169 - 176
26	Shri. K. S. Chandi	Contested Pasts, Contested Selves: Heritage, Power, and the Politics of Identity in Postcolonial Societies	177 - 182
27	Dr. Panchama S. N.	Nota, Abstention, and Apathy: Rethinking Electoral Non-Participation as Political Expression in Indian Democracy	183 - 193
28	Dr. Prakash H. Jogin	Contemporary Issues in Indian Democracy and Governance	194 - 199
29	Prakash S. Kamati	Decline of Inner-Party Democracy and Rise of Dynastic Politics: A Crisis of Representation in Indian Democracy	200 - 203
30	Dr. Geeta Mallapur	Challenges Facing Women Candidates in Local Governance and Elections: A Study of Political Participation, Representation and Empowerment	204 - 212
31	Dr. Ravichandra Walikar Dr. Yallappa Mugalihal	Karnataka's Youth and Freebie Politics: A Comprehensive Study of Attitude Formation and Democratic Participation	213 - 218
32	Priyanka Kolakar Dr. Shrikant Muchandi	Women's Representation in Local Governance in Karnataka	219 - 224
33	Smt. Rohini Patil	Government Policies, Regulatory Reforms, and Public–Private Partnerships in Healthcare: Enhancing Access, Quality, and Sustainability	225 - 227
34	Dr. Suresh Takatarao	From Political Apathy to Political Engagement: Changing Patterns of Youth Participation in Indian Democracy	228 - 235
35	Veena Mane	Public Policy, Welfare, and Social Justice: Reimagining the Indian Social Contract in the 21st Century	236 - 242
36	Dr. Sangamesh I. Patil	Civic Engagement and Digital Governance in Karnataka	243 - 246
37	Dr. Gurupadayya N. Hiremath	BRICS 2026: Emerging Dimensions of Multi polarity and Global Governance	247 - 255
38	Dr. Sunanda. M. Madar	Migration, Urban Growth and Politics in Bengaluru: Emerging Issues of Urban Governance and Political Inclusion	256 - 264
39	Dr. Vidyashree Kolkar	Media and Political Polarization in India	265 - 270
40	Amrut S. Hugar	Open Access E-Resources and Scholarly Communication: Transforming Academic Libraries and Research in India	271 - 277

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Health Care Infrastructure and Employment Status Among Tribal Population in Karnataka

Dr. Ningappa Koujageri[1] & Dr. Anilkumar S. H.[2]

[1]*Assistant Professor of Economics, KLE'S SVS Bellubbi Arts and Commerce College, Saundatti.*

[2]*Research Assistant, CMDR-Dharwad, Karnataka.*

Corresponding Author – Dr. Ningappa Koujageri

DOI -10.5281/zenodo.23058217

Abstract:

India is home to diverse tribal communities, with Scheduled Tribes (STs) accounting for approximately 8.6 per cent of the total population, with a large proportion residing in rural and remote areas. This study examines health-care infrastructure and employment status among the tribal population in Karnataka using secondary data from the Rural Health Statistics 2021–22 and relevant government reports. The analysis focuses on key indicators of health infrastructure, availability of health facilities, and health-care manpower, along with employment conditions. The findings indicate considerable gaps in health-care infrastructure and human resources in tribal areas. Shortages of medical personnel, inadequate facilities, geographical remoteness and socio-economic constraints affect access to essential health services and livelihood opportunities. The study highlights the need for improved health infrastructure, adequate staffing and employment-oriented development interventions for tribal communities in Karnataka.

Keywords: Health Care Infrastructure, Employment Status, Schedule Tribal and Karnataka.

Introduction:

Health and employment are two closely interconnected dimensions of socio-economic development, particularly among Scheduled Tribe (ST) communities living in geographically remote and economically vulnerable areas. Karnataka has a significant tribal population of about 42.49 lakh, constituting nearly 6.99 per cent of the state's population, according to Census 2011. The state has 50 Scheduled Tribe communities, including two Particularly Vulnerable Tribal Groups (PVTGs)—Koraga and Jenu Kuruba. (Tribal Affairs India)

Access to adequate health-care infrastructure is an important determinant of the well-being and productive capacity of tribal households. Remote settlements, inadequate transport connectivity, shortages of health personnel and limited availability of specialised services can create barriers to timely health care. Karnataka's health-sector policy documents specifically identify transportation difficulties and human-resource gaps in tribal areas and emphasise the need for locally recruited health workers, mobile medical services and stronger primary-level facilities. (HFW Karnataka) Recent state data indicate that Karnataka had 2,132 functioning PHCs and 1,184 sub-centres under the reported 2024–25 programme achievements up to January 2025, although these figures are for the state as a whole and do not represent tribal areas alone. (HFW Karnataka)

Employment is equally important because stable livelihoods influence household income, nutrition, access to health services and overall living standards. Earlier official social-group data show that Karnataka's ST population had substantial labour-force participation, while differences existed by gender and rural–urban location. (Stats Ministry) Therefore, examining health-care infrastructure together with employment status provides a broader

understanding of tribal socio-economic development.

The socio-economic conditions of the Scheduled Castes (SCs) and Scheduled Tribes (STs) in Karnataka reflect a complex history of social exclusion, economic marginalization, and gradual progress. These communities, historically worried and excluded from mainstream socio-economic development, continue to face challenges in areas such as education, employment, health, and access to basic services. Despite various affirmative action policies and protective legislation aimed at improving their status, SCs and STs in Karnataka still experience lower literacy rates, higher poverty levels, and limited representation in higher-income professions.

Review of Literature:

The socio-economic status of the tribal community in Karnataka is characterized by persistent challenges, despite incremental improvements over time. According to Bhat (2004), tribal communities in Karnataka have historically faced exclusion from mainstream socio-economic development, particularly in terms of access to education, healthcare, and economic opportunities. Many tribal groups continue to reside in remote rural areas, where poverty and lack of infrastructure remain widespread (Bhat, 2004). The low literacy rates and limited employment opportunities for tribal people confine them to unskilled labor, with healthcare access also being a significant concern (Narayana, 2006). However, government initiatives like affirmative action, reservations in education and employment, and targeted welfare schemes have led to some positive changes. As noted by Joshi (2010), there has been a gradual rise in literacy rates and increased political participation among tribal communities. Nevertheless, as pointed out by Kumar and Ramesh (2015), disparities still exist in areas such as healthcare, income levels, and social mobility, requiring continued focus on addressing systemic barriers to ensure true socio-economic integration of the tribal population in Karnataka.

Objectives of the Study:

1. To examine the status and availability of health-care infrastructure among the tribal population in Karnataka.
2. To analyse the employment status and livelihood conditions of the tribal population in Karnataka.
3. To identify the major challenges and gaps in health-care infrastructure and employment opportunities.

Methodology of the Study:

This study has been used the secondary data only, obtained from various sources, including Annual Report of Ministry of Tribal Affairs Govt of India, and Karnataka Economic Survey reports. The study used the health indicators as. Health Care Infrastructure and Building Position. The indicators include health female workers, health male workers, health assistants, doctors, AYUSH doctors, laboratory technicians, nursing staff, pharmacists, surgeons, obstetricians and gynaecologists, physicians, paediatricians, radiographers and General Duty Medical Officers. For each category, the study considers required, sanctioned, in-position, vacant and shortfall positions. Statistical tools such as percentages, Growth Rate, as well as bar diagrams and charts, are utilised where necessary in the analysis.

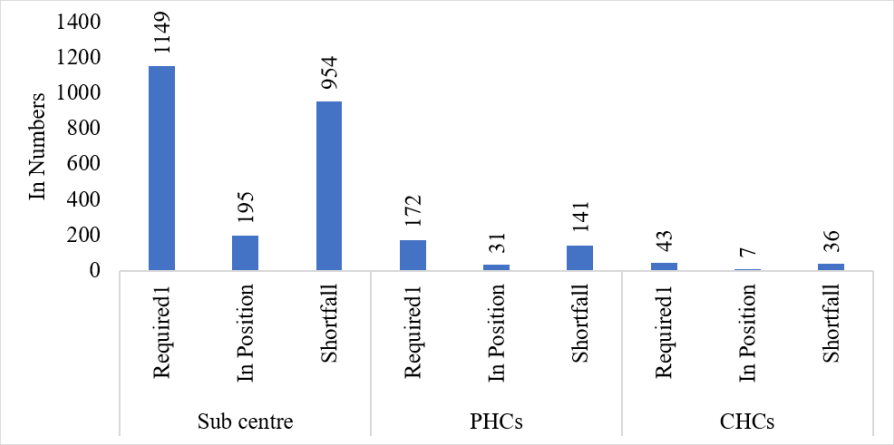
Result and Discussion:

Health Care Infrastructure:

Health-care infrastructure is a fundamental component of human development and plays an important role in improving the health and socio-economic well-being of the population. It includes the network of Sub-Centres (SCs), Primary Health Centres (PHCs), Community Health Centres (CHCs), hospitals, diagnostic facilities, medicines, medical equipment and health-care personnel required to provide preventive, promotive, curative

and rehabilitative services. Adequate health infrastructure improves accessibility, reduces geographical and economic barriers, and enables timely treatment, particularly for vulnerable and geographically isolated communities.

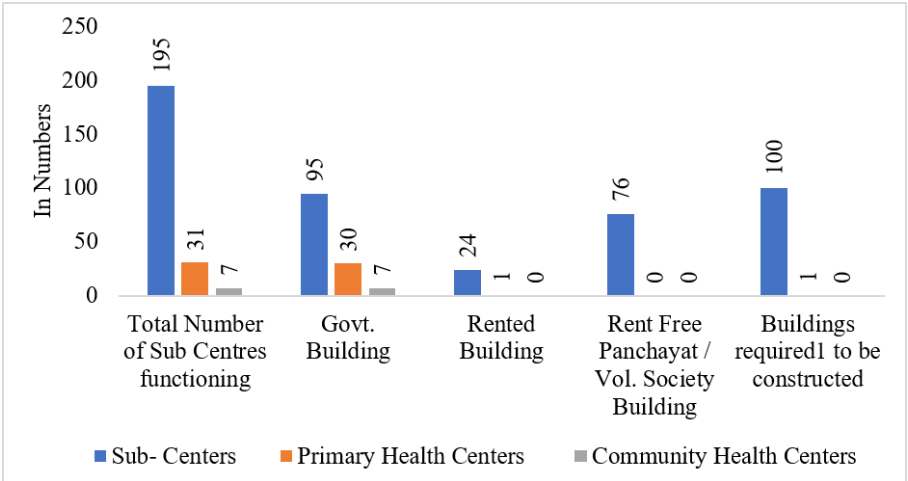
Chart: 1 Requirement and Shortfall of Sub Centres, PHCs & CHCs in Tribal Areas in Rural Karnataka (As on 31st March, 2022)



Source: *Rural Health Statistics -2021-22*

The chart 1 presents the requirements and shortfalls for Sub-Centres, Primary Health Centres (PHCs), and Community Health Centres (CHCs) in tribal areas of Karnataka as of March 31, 2022. It shows significant gaps in the healthcare infrastructure. For Sub-Centres, the state requires 1,149, but only 195 are in position, resulting in a shortfall of 954. This shortfall points to a considerable gap in basic healthcare services, especially in remote tribal areas. Similarly, for PHCs, Karnataka requires 172 personnel, but only 31 are in position, creating a shortfall of 141. This indicates a severe lack of personnel in primary healthcare centres, which are vital for providing essential health services to rural populations. The situation at the CHC level is equally concerning, with 43 required, but only 7 in position, leading to a shortfall of 36. These gaps across all three healthcare tiers highlight the urgent need for strengthening of healthcare services in Karnataka's tribal areas to ensure better healthcare access and outcomes for these underserved populations.

Chart:2 Building Position of Sub-Centre, PHCs & CHCs in Tribal Areas in Karnataka (As on 31st March, 2022)



The table outlines the building positions of Sub-Centers, Primary Health Centers (PHCs), and Community Health Centers (CHCs) in tribal areas of Karnataka as of March 31, 2022. For Sub-Centers, there are 195 functioning, with 95 housed in government buildings, 24 in rented buildings, and 76 in rent-free buildings provided by Panchayats or voluntary societies. This leaves a substantial need for 100 new buildings to be constructed to meet the requirements. Primary Health Centers (PHCs) show a slightly better situation, with 31 centers in total; 30 are located in government buildings, and only one in a rented building. However, there is still a need for one more building to be constructed. Community Health Centers (CHCs) have 7 centers, all of which are situated in government buildings, with no rented or Panchayat/voluntary society buildings in use, and no immediate construction needs. The data indicates that while a large portion of healthcare centers, particularly PHCs and CHCs, are functioning in government-owned buildings, there remains a significant infrastructure gap for Sub-Centers, especially in the form of a substantial need for new construction to improve healthcare delivery in tribal areas.

Employment Status:

Health-care workers are a critical component of the health system and play an essential role in delivering preventive, promotive, curative and rehabilitative services. They include doctors, nurses, pharmacists, laboratory technicians, Auxiliary Nurse Midwives (ANMs), health assistants, community health officers and other medical and paramedical personnel. The availability, distribution and adequacy of these workers directly influence the accessibility and quality of health-care services, particularly in rural and underserved areas.

Table:1 Availability and Staffing Gaps of Health Workers at Different Levels of Health Centres in Tribal Areas of Karnataka (As on 31st March 2022)

Centres	Indicators	Required	Sanctioned	In Position	Vacant	Shortfall
Sub-Centres	Health Female Worker	195	145	101	44	94
	Health Male Worker	195	75	28	47	167
	Total	**390**	**220**	**129**	**91**	**261**
Primary Health Centres	Health Female Worker	31	177	131	46	**
	Health Assistants (Male + Female)	62	75	35	40	27
	Doctors	31	34	28	6	3
	Ayush Doctors	3	3	4	0	**
	Lab Technicians	31	29	19	10	12
	Nursing Staff	31	40	38	2	*
	Pharmacists	31	27	14	13	17
	Total	**220**	**385**	**269**	**117**	**59**
Community Health Centres	Surgeons	7	6	2	4	5
	Obstetricians & Gynaecologists	7	8	4	4	3
	Physicians	7	3	2	1	5
	Paediatricians	7	7	1	6	6
	Lab Technicians	7	16	13	3	**
	Nursing Staff	49	70	70	0	**
	Pharmacists	7	11	6	5	1
	Radiographers	7	5	3	2	4
	General Duty Medical Officers-Allopathic	14	8	8	0	6
	Total	**112**	**134**	**109**	**25**	**30**

Source: *Rural Health Statistics -2021-22*Note: 1. ** Surplus

The table 2 presents the status of health workers. In Sub-Centres, the need for health workers is significantly higher than the available staff, with 195 required female health workers, of which only 101 are in position, resulting in a shortfall of 94. The situation is even more pronounced for male health workers, where 75 are required, but only 28 are in position, leading to a shortfall of 167. This highlights a major gap in staffing at the grassroots healthcare level.

For Primary Health Centres (PHCs), there is a better staffing scenario, with female health workers and health assistants in relatively higher numbers. While 177 female health workers are required, 131 are in position, and for health assistants, 75 are required, with 35 in position, resulting in a shortfall of 40. The shortage of doctors is also a concern, with only 28 of the required 31 in position, leaving a shortfall of 3. Despite this, other categories like AYUSH doctors, lab technicians, and nursing staff are relatively better staffed, although some shortfalls remain in specific areas such as pharmacists.

At the Community Health Centres (CHCs), there are 7 required surgeons, with only 2 in position, leaving a significant shortfall of 5. Similar shortfalls are seen in obstetricians, pediatricians, and physicians, which could have a significant impact on the quality of healthcare in these areas. However, nursing staff and lab technicians are relatively well-staffed, with 70 out of 70 nursing positions filled, indicating some strength in these support roles. Overall, the table reflects considerable gaps in staffing, especially in key medical positions such as health workers, surgeons, and doctors, which undermines the effectiveness of healthcare delivery in Karnataka's tribal areas. These shortfalls point to the urgent need for increased recruitment and training to meet the healthcare demands of the tribal population.

Findings of the Study:

The findings from the data presented across Charts and tables reveal several key insights into the health infrastructure and employment status among different social groups in Karnataka.

- It shows significant gaps in the healthcare infrastructure. For Sub-Centres, the state requires 1,149, but only 195 are in position, resulting in a shortfall of 954. This shortfall points to a considerable gap in basic healthcare services, especially in remote tribal areas. Similarly, for PHCs, Karnataka requires 172 personnel, but only 31 are in position, creating a shortfall of 141. This indicates a severe lack of personnel in primary healthcare centres, which are vital for providing essential health services to rural populations.
- For Sub-Centres, there are 195 functioning, with 95 housed in government buildings, 24 in rented buildings, and 76 in rent-free buildings provided by Panchayats or voluntary societies. This leaves a substantial need for 100 new buildings to be constructed to meet the requirements.
- The findings demonstrate that the human-resource situation in tribal areas of Karnataka is characterised by uneven distribution rather than uniform shortage. Sub-Centres show the most pronounced staffing deficiencies, particularly among male health workers. PHCs have a relatively higher overall staffing level, but shortages remain among health assistants, laboratory technicians and pharmacists. At CHCs, specialised doctors—including surgeons, physicians and paediatricians—are substantially below the required level.
- The table reflects considerable gaps in staffing, especially in key medical positions such as health workers, surgeons, and doctors, which undermines the effectiveness of healthcare delivery in Karnataka's tribal

areas. This highlights a major gap in staffing at the grassroots healthcare level.

Conclusion:

The study concludes that the tribal population in Karnataka continues to face important challenges in accessing adequate health-care infrastructure and human resources. The analysis of Rural Health Statistics 2021–22 indicates substantial gaps in the availability of health facilities, particularly at the Sub-Centre level, where the requirement for new buildings and health personnel remains considerable. Staffing shortages are also evident among female and male health workers, health assistants, pharmacists, laboratory technicians and specialised medical professionals at PHCs and CHCs. Although some categories, such as nursing staff and AYUSH personnel, show relatively adequate or surplus availability, these strengths do not compensate for shortages in critical services. The findings suggest that improving tribal health outcomes requires not only the expansion of physical infrastructure but also timely recruitment, retention and equitable deployment of qualified health workers. Strengthening primary health services, improving connectivity to remote tribal settlements, providing adequate medical equipment and medicines, and promoting employment and livelihood opportunities can contribute to better socio-economic well-being. Coordinated implementation of tribal welfare and health programmes, with greater attention to local needs and geographical conditions, is essential for reducing disparities and ensuring more accessible and equitable health-care services for tribal communities in Karnataka.

Reference:

1. Bhat, A. (2004). Tribal Development in Karnataka. Delhi: Publication House.
2. Narayana, D. (2006). Socio-economic Development of Tribal Communities. Bangalore: Academic Press.
3. Joshi, R. (2010). Challenges in Tribal Empowerment in Karnataka. Journal of Social Development, 22(3), 45-58.
4. Kumar, P., & Ramesh, V. (2015). Tribal Welfare and Progress in Karnataka. Tribal Affairs Journal, 31(1), 112-123.
5. Ministry of Tribal Affairs, Government of India. *Karnataka: Key Achievements and Tribal Profile*.
6. Government of Karnataka, Department of Health and Family Welfare. Karnataka Health Vision Report. (HFW Karnataka)
7. Government of Karnataka, Department of Health and Family Welfare. Annual Report 2024–25. (HFW Karnataka)
8. MoSPI. NSS Report No. 543: Employment and Unemployment Situation among Social Groups in India. (Stats Ministry)

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Skill Development for Youth Employability in India: A Study of Opportunities and Challenges

Dr. Husensab Nadaf

Assistant Professor, Department of Economics,

KLE Society's S. Nijalingappa College, II Block, Rajajinagar, Bengaluru

Corresponding Author – Dr. Husensab Nadaf

DOI - 10.5281/zenodo.23058230

Abstract:

Skill development has become a strategic priority for India as the country seeks to leverage its young workforce to drive economic growth and social transformation. This study examines the trends, opportunities, and challenges associated with skill development and employability in India between 2015 and 2022. The analysis draws on data covering work participation rates by gender, domain-wise employability, and the performance of flagship initiatives such as the Pradhan Mantri Kaushal Vikas Yojana (PMKVY). Findings reveal that while overall employability has improved over time, significant disparities persist across educational streams and between genders. Professional domains such as engineering and pharmacy consistently report higher employability, whereas general and vocational programs lag behind. The data also highlights a persistent gap between the number of candidates certified under PMKVY and those successfully placed in employment, underscoring the need for stronger industry linkages and post-training support mechanisms. Despite these challenges, substantial opportunities exist to further enhance skill development outcomes. These include leveraging technology-enabled learning platforms, fostering public-private partnerships, and designing inclusive policies to increase women's participation in the workforce. The study concludes that while India has made notable progress in expanding access to skill training, sustained efforts are essential to improve the quality, relevance, and impact of these initiatives to ensure that skill development translates into meaningful and sustainable employment opportunities.

Keywords: Skill development, Employability and PMKVY.

Introduction:

Knowledge and skills are the primary forces behind social and economic progress in any country. The ability to adapt more successfully to opportunities and difficulties in both the domestic and global job markets is made possible by higher levels and better standards of skill. India is expected to require 500 million skilled workers by 2022. However, with only 2% of the total workforce in India has gotten such training as of this writing, the country continues to face a labour shortage. According to estimates from the Indian government, 93% of workers and labourers are employed in the unorganized or informal sector. A formal system of skill development does not support it. According to the current educational system, young people are not receiving any instruction on employable skills that could open up employment chances for them. Workers in the unorganized sector frequently develop their skills on the job.

The mechanisms for gathering knowledge and developing skills are unclear or not well understood. The majority of the labour force in India possesses out-of-date skills. The difficulty will only get worse because more than 75% of new employment prospects are anticipated to be skill-based. The loss of income and work throughout the skill training programme also discourages skill development.

India has a very complicated environment for skill development. India's vocational education has largely been unregulated. The private sector has begun to play a bigger role in skill development, nevertheless, especially when it comes to training for the services sector. Approximately 2.2% of people between the ages of 15 and 59 reported receiving formal vocational training, and 8.6% reported receiving non-formal vocational training, according to the NSSO's 2011–12 (68th round) report on the Status of Education and Vocational Training in India.

The terms "skill" and "development" refer to the process of doing something better by adding something new. To add something new to our existing abilities and advance them, to keep growing, is to expand our skills. In today's rapidly developing world, skill development is crucial to success. The development of skills is important for both social and economic progress.

It is crucial to provide employment possibilities for the more than 12 million young people who reach working age in India each year due to the country's changing demographics. It is anticipated that only 2.7 million net additional jobs were created in the nation over the seven years of 2005–2012. The kids must be given the appropriate training and education to enable an employment-ready workforce in the future. The nation currently faces two challenges: a serious lack of highly skilled, quality labour and the inability of substantial segments of the educated workforce to find employment due to their lack of sufficient job skills. Thus, the issue with talent development in India is relevant from both a supply and demand perspective.

Review of Literature:

According to the **National Skill Development Corporation (NSDC) Report (2015),** sectors such as construction, retail, healthcare, and IT require millions of skilled workers annually. However, poor infrastructure, lack of standardized curriculum, and insufficient qualified trainers are major obstacles to scaling up skill development initiatives.

FICCI (2016) observes that the perception of vocational education as inferior to academic pathways deters students from enrolling in skill development programs. The report recommends stronger industry linkages, awareness campaigns, and incentives to make vocational training aspirational.

ILO (2018) highlights gender disparities in skill development, noting that women's participation remains low due to social norms, mobility constraints, and lack of supportive facilities. The report stresses the need for inclusive strategies to ensure equitable access to training opportunities.

World Bank (2020) emphasizes the role of technology and digital platforms in expanding the reach of skill development programs. The study finds that blended learning and e-learning models can improve access in rural areas but require investment in digital infrastructure and trainer capacity building.

Pandey and Tiwari (2021) assess the impact of the Pradhan Mantri Kaushal Vikas Yojana (PMKVY), concluding that while the scheme has improved enrollment in short-term training, the placement rates remain suboptimal. The authors recommend stronger post-training support and partnerships with industry for better employment outcomes.

Objectives of the Study:

1. To examine the work participation, Employability and Domains wise Employability in India.
2. To analyse the Pradhan Mantri Kaushal Vikas Yojana in India

Research Methodology:

The Study is based on secondary data collected from various sources like website, annual reports and Ministry of Skill and Development Government of India during 2015 to 2022 in India.

Result and Discussion:

Table 1 shows the distribution of participation at work by gender in India from 2015 to 2022. Overall, men consistently reported higher work participation rates compared to women. In 2015, men's participation stood at 70%, while women's was significantly lower at 30%. Over the years, men's participation fluctuated, peaking at 77% in 2018 and 2020. Notably, women's participation declined during the same years, dropping to a low of 23%. This inverse relationship suggests that when men's participation increased sharply, women's engagement in the workforce decreased.

A remarkable shift occurred in 2021 when men's work participation fell to 64%, the lowest in the series, while women's participation rose substantially to 36%, the highest recorded during this period. This reversal could reflect the impact of the COVID-19 pandemic, which disrupted formal employment and prompted more women to engage in informal or home-based economic activities. In 2022, participation rates slightly rebounded for men (67%) and declined marginally for women (33%), suggesting a partial normalization of workforce patterns post-pandemic.

The data highlights a persistent gender gap in work participation, with men dominating employment across all years. Despite occasional improvements in women's participation, the gap remains wide, indicating ongoing structural and social barriers that limit women's engagement in the labor market. Addressing these disparities requires targeted policy interventions, skills training, and supportive measures to promote gender-inclusive workforce participation.

Table 1: Distribution of participation at work (in percent)

Year	Work Participation Rate	
	Men	Women
2015	70	30
2016	68	32
2017	71	29
2018	77	23
2019	75	25
2020	77	23
2021	64	36
2022	67	33

Source: India Skill Report 2021 and 2022

The table 2 presents the percentage of employability in India from 2015 to 2022, highlighting a gradual upward trend over the eight-year period. In 2015, the employability rate was relatively low at 37.22%. This figure improved modestly in the following two years, rising to 38.12% in 2016 and 40.44% in 2017, suggesting early signs of progress in skill development and job readiness.

A more significant increase was observed between 2017 and 2019. Employability jumped from 40.44% in 2017 to 45.6% in 2018 and further to 47.38% in 2019, marking the highest growth phase during the period. This sharp rise may be attributed to intensified policy efforts under initiatives such as Skill India Mission and increased industry collaboration to bridge skill gaps. However, from 2020 onwards, employability levels showed a slight decline and then stabilization. In 2020, the rate decreased to 46.21%, likely reflecting the disruptions caused by the COVID-19 pandemic, which affected training delivery and hiring patterns. A marginal dip continued in 2021 to 45.90%, but by 2022, employability had recovered slightly to 46.2%.

Table 2: Percentage of Employability changed over the year 2015 to 2022

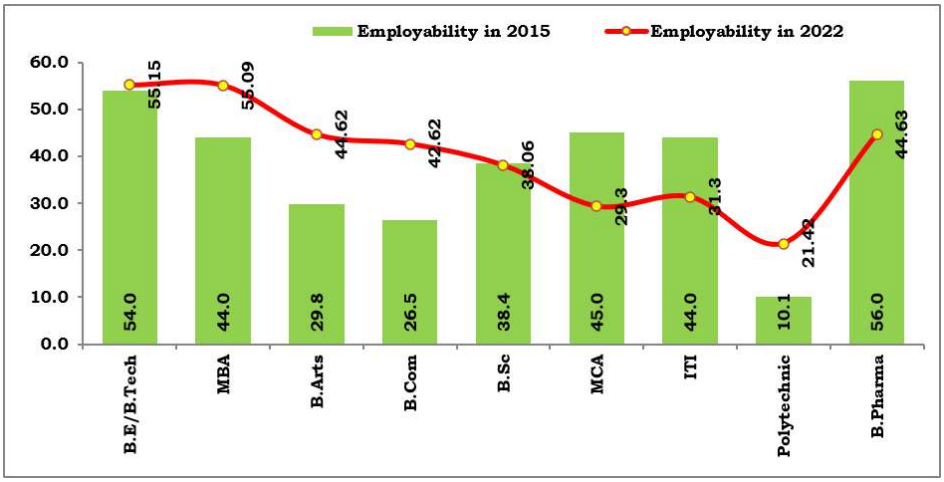
Year	Employability
2015	37.22
2016	38.12
2017	40.44
2018	45.6
2019	47.38
2020	46.21
2021	45.90
2022	46.2

Source: India Skill Report 2021 and 2022

Figure 1 illustrates the changes in employability percentages across various educational domains in India between 2015 and 2022. Overall, B.E./B.Tech and B.Pharma recorded the highest employability rates, with B.E./B.Tech rising slightly from 54.0% in 2015 to 55.15% in 2022, and B.Pharma showing a notable increase from 44.63% to 56.0%, the largest gain among all fields. MBA graduates also experienced a small improvement, from 44.0% to 55.09%. Conversely, domains such as B.Sc, B.Com, and B.Arts remained relatively low in employability. B.Sc decreased from 38.4% in 2015 to 38.06% in 2022, while B.Com dropped from 26.5% to 23.3%, indicating persistent challenges in aligning these degrees with industry requirements. B.Arts, though starting low at 29.8%, improved modestly to 44.62%.

Technical and vocational domains show mixed trends. Polytechnic graduates had the lowest employability, increasing only slightly from 10.1% to 21.42%, despite overall progress in skilling initiatives. ITI employability declined from 44.0% to 31.3%, highlighting potential issues in vocational training quality or market perception. Notably, MCA graduates saw a decline from 45.0% to 23.3%, reflecting challenges in adapting curricula to evolving IT industry needs. In contrast, B.E./B.Tech and B.Pharma consistently maintained higher employability, suggesting stronger alignment with market demands.

Figure 1: Distribution of Domains wise Employability in India 2015 to 2022 (in %)



Source: India Skill Report 2021 and 2022

Table 3 presents the performance of PMKVY from 2016–17 to 2021–22, capturing the number of candidates enrolled, trained, assessed, certified, and placed (in lakh). The data shows a clear upward trend in outreach and training activities over the six years. In 2016–17, 25.83 lakh candidates enrolled, and this figure grew steadily, reaching 142.65 lakh by 2021–22—an almost sixfold increase in enrollment. A similar rise is evident in training, which increased from 22.07 lakh candidates trained in 2016–17 to 135.13 lakh in 2021–22. Assessment and certification numbers also followed this growth trajectory. Candidates assessed rose from 20.50 lakh in 2016–17 to 122.58 lakh in 2021–22. Certification improved significantly, growing from 15.37 lakh in 2016–17 to 108.42 lakh by 2021–22, demonstrating the scaling up of program delivery.

However, the data highlights a persistent gap between certification and actual placement. Despite the large numbers of candidates certified, placement figures remained relatively low in comparison. In 2016–17, only 2.67 lakh candidates were placed, and even in 2021–22, placements reached just 24.13 lakh, indicating that only a small proportion of certified individuals secured employment. The average placement over the six years was 15.18 lakh candidates per year, compared to an average certification figure of 64.13 lakh—suggesting that less than a quarter of certified candidates were placed in jobs.

Table 3: Performance of PMKVY in India (in Lakh)

Duration	Candidates Enrolled	Candidates Trained	Candidates Assessed	Candidates Certified	Candidates Placed
2016-17	25.83	22.07	20.50	15.37	2.67
2017-18	50.10	43.31	39.15	31.62	7.20
2018-19	70.64	63.71	57.33	47.53	14.25
2019-20	130.01	109.36	97.21	78.14	20.33
2020-21	136.66	128.97	116.56	103.72	22.49
2021-22	142.65	135.13	122.58	108.42	24.13
Total Average	**92.65**	**83.76**	**75.56**	**64.13**	**15.18**

Source: https://www.msde.gov.in/en/reports-documents/annual-reports

Opportunities and Challenges:

1. Opportunities:

Growing Demand for Skilled Workers: Rapid industrialization, digital transformation, and the expansion of sectors such as IT, healthcare, renewable energy, and logistics are fueling the demand for skilled workers. This demand provides an opportunity to align training programs with industry needs, reducing skill gaps and improving employability outcomes for millions of job seekers.

Government Initiatives and Policy Support: The Indian government has launched flagship initiatives such as the Skill India Mission, Pradhan Mantri Kaushal Vikas Yojana (PMKVY), and National Skill Development Corporation (NSDC). These programs provide funding, infrastructure, and policy support to create a robust ecosystem for vocational training and certification, offering new avenues for skill development across diverse regions and communities.

Emergence of Digital Learning Platforms: Technology-enabled learning has opened new possibilities for delivering skill training at scale. E-learning platforms, mobile apps, and virtual classrooms are making it easier to access quality training even in remote areas. This creates

opportunities to democratize skill development and reach marginalized populations, including women and rural youth.

Potential for Entrepreneurship and Self-Employment: Skill development is not limited to creating job-ready employees but also empowers individuals to become entrepreneurs and self-employed. Training in areas such as digital marketing, handicrafts, food processing, and repair services can promote micro-enterprises and startups, reducing dependency on traditional employment and fostering local economic development.

Global Employment Opportunities: With the right skills and certifications, Indian workers have growing prospects in international markets, especially in healthcare, construction, and IT services. Skill development programs aligned with international standards and language training can prepare the workforce for overseas employment, increasing remittances and global competitiveness.

2. Challenges:

Mismatch between Skills and Industry Requirements: One of the biggest challenges is the gap between the skills imparted through training programs and the actual needs of employers. Outdated curricula, lack of practical exposure, and inadequate alignment with emerging technologies often result in a workforce that is certified but still unemployable. Bridging this mismatch requires continuous updating of training content and stronger industry participation.

Quality and Standardization of Training: The quality of skill training varies widely across institutions and regions. Many training centers lack qualified trainers, modern equipment, and standardized assessment methods. As a result, certificates awarded by different organizations are not equally valued by employers, undermining the credibility of the skilling ecosystem.

Limited Awareness and Aspirational Barriers: Vocational education and skill training are often perceived as second-class options compared to formal academic degrees. This societal mindset discourages youth and their families from enrolling in skill development programs. Creating awareness about the value and career prospects of vocational skills remains a major challenge.

Inadequate Funding and Infrastructure: Despite government initiatives, many training centers struggle with limited funding, insufficient infrastructure, and lack of modern training aids. Particularly in rural and remote areas, inadequate facilities hamper the delivery of effective, high-quality training that can meet industry standards.

Low Participation of Women: Women face multiple barriers such as social norms, safety concerns, and lack of supportive facilities like childcare, which limit their participation in skill development programs. Addressing gender disparities requires targeted interventions, inclusive policies, and safe training environments.

Conclusion:

Skill development has emerged as a crucial pillar of India's efforts to harness its demographic dividend and address persistent unemployment and underemployment challenges. Over the past decade, initiatives like the Pradhan Mantri Kaushal Vikas Yojana (PMKVY) have made significant strides in expanding access to skill training, as reflected in the steady rise in enrollment, training, and certification numbers. However, the analysis reveals that while large-scale skilling programs have improved participation and awareness, translating these efforts into meaningful employment remains an area of concern. Trends in employability show gradual improvement overall, but substantial disparities persist across educational streams, with professional courses like B.E./B.Tech and B.Pharma showing higher employability compared to general and vocational programs.

The persistent gap between the number of candidates trained and those actually placed in jobs underscores the need to strengthen linkages between training providers and industry. Enhancing the quality and relevance of curricula, investing in modern infrastructure, and fostering public-private partnerships will be critical to bridging the

employability gap. Additionally, targeted strategies are necessary to improve participation of women and marginalized groups, promote lifelong learning, and build resilience against disruptions such as those seen during the COVID-19 pandemic.

References:

1. **FICCI (2016).** *Skill Development in India: Achievements and Challenges.* Federation of Indian Chambers of Commerce and Industry. Retrieved from https://ficci.in
2. **International Labour Organization. (2018).** *India Wage Report: Wage Policies for Decent Work and Inclusive Growth.* International Labour Office, Geneva.
3. **Mehrotra, S., Gandhi, A., Saha, P., & Sahoo, B. K. (2014).** *Turnaround in India's Employment Story: Silver Linings amidst Joblessness and Informalization.* Economic and Political Weekly, 49(35), 87–96.
4. **Ministry of Skill Development and Entrepreneurship (MSDE). (2022).** *Annual Report 2021–22.* Government of India. Retrieved from https://www.msde.gov.in
5. **National Skill Development Corporation (NSDC). (2015).** *Annual Report.* NSDC, New Delhi.
6. **Pandey, A., & Tiwari, V. (2021).** *Skill Development Initiatives in India: Challenges and Opportunities.* International Journal of Management Studies, 8(2), 45–52.
7. **Singh, M. (2012).** *Vocational Education and Skills Training in India: A Labour Market Perspective.* International Journal of Training Research, 10(1), 31–43.
8. **World Bank. (2020).** *Skilling India: No Time to Lose.* Washington, DC: World Bank Group. Retrieved from https://www.worldbank.org
9. **Ministry of Labour and Employment (2021).** *Periodic Labour Force Survey (PLFS), Annual Report 2020-21.* Government of India.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Crop Insurance as a Financial Risk Management Tool: A Study of Farmers' Income and Livelihood in Belagavi District

Mr. Shivanand Halolli[1] & Prof. D. N. Patil[2]

[1]*Research Scholar, Assistant Professor,*

Department of Economics, SKMM Govt. First Grade College Saundatti-591126

[2]*Professor and Registrar (Evaluation), Department of Studies in Economics,*

Kitturu Rani Channamma University Belagavi, India

Corresponding Author – Mr. Shivanand Halolli

DOI - 10.5281/zenodo.23058247

Abstract:

Agriculture is inherently exposed to climatic, biological, and market-related risks that affect farm production, income, and rural livelihoods. Crop insurance is an important financial risk-management instrument that can reduce the adverse effects of crop loss, protect working capital, and support the continuity of agricultural operations. This study examines crop insurance as a financial risk-management tool in relation to farmers' income and livelihood security in Belagavi district, Karnataka. The study is based exclusively on secondary data obtained from the Agriculture Census, Government of Karnataka statistical publications, Pradhan Mantri Fasal Bima Yojana (PMFBY) guidelines, Ministry of Agriculture and Farmers Welfare documents, district reports, and published studies on crop insurance in Northern Karnataka. The findings indicate that Belagavi has a high concentration of small and marginal holdings, with approximately 75.2% of operational holdings below two hectares. Sugarcane is a dominant crop in the district, creating substantial financial exposure because of its long duration and high input requirement. PMFBY provides subsidised crop-risk coverage through low farmer premium rates; however, its effectiveness is influenced by claim settlement, adequacy of compensation, awareness, institutional accessibility, and transparency in loss assessment. Delayed claims, inadequate compensation, and limited awareness reduce farmers' confidence in crop insurance. The study concludes that crop insurance can contribute to farm-income stability and livelihood resilience only when it is timely, affordable, transparent, and responsive to local production conditions. It recommends stronger insurance literacy, taluk-level facilitation centres, timely claim settlement, transparent assessment, crop-specific products, and regular publication of district-level insurance data.

Keywords: Crop Insurance; Financial Risk Management; Farm Income; Livelihood Security.

Introduction:

Agriculture is one of the most risk-prone sectors of the Indian economy. Farmers face uncertainty arising from drought, irregular rainfall, floods, pest and disease incidence, yield fluctuations, price instability, and rising costs of cultivation. These risks are particularly severe for small and marginal farmers because they possess limited land, savings, assets, and borrowing capacity. A crop failure may reduce farm income, weaken repayment capacity, increase indebtedness, and affect expenditure on food, health, education, and future agricultural investment.

Crop insurance is designed to reduce the financial impact of agricultural loss. It transfers part of the risk associated with crop production from farmers to insurance agencies and the government. By providing compensation for notified crop losses, crop insurance can protect farm income, preserve working capital, reduce dependence on informal borrowing, and support the continuation of agricultural activities.

The Pradhan Mantri Fasal Bima Yojana (PMFBY), introduced from the Kharif season of 2016, is the principal crop-insurance scheme in India. The scheme aims to provide affordable crop-risk protection through capped farmer premiums and government subsidy. The maximum premium payable by farmers is generally 2% of the sum insured for Kharif foodgrain and oilseed crops, 1.5% for Rabi foodgrain and oilseed crops, and 5% for annual commercial and horticultural crops (Ministry of Agriculture and Farmers Welfare, 2016; Press Information Bureau, 2024).

Belagavi district is an appropriate setting for analysing crop insurance because agriculture plays a major role in the district economy and a substantial share of holdings are small or marginal. The district grows sugarcane, maize, paddy, pulses, turmeric, and other crops. Sugarcane has special importance because of its large cultivated area, high input cost, long crop duration, and dependence on timely irrigation and labour. In such a context, crop insurance can be an important instrument for income stabilisation and livelihood security.

Review of Literature:

The literature on agricultural risk management identifies crop insurance as an institutional mechanism for reducing the income instability caused by crop failure. Farmers generally manage risk through crop diversification, irrigation, savings, livestock rearing, borrowing, migration, and informal social support. However, these strategies may not be sufficient when crop losses are widespread or severe. Crop insurance can provide formal financial protection by compensating farmers for insured losses.

Small and marginal farmers have a greater need for crop insurance because they are more vulnerable to production shocks. A decline in crop yield can reduce their capacity to repay loans, purchase inputs, meet household needs, and continue farming in the next season. Crop insurance may therefore support consumption smoothing, credit continuity, asset protection, and reinvestment in agriculture.

PMFBY was introduced to improve crop-insurance coverage, reduce the premium burden on farmers, and enhance the use of technology in crop-loss assessment. The scheme limits the farmer premium to 2% for Kharif crops, 1.5% for Rabi crops, and 5% for annual commercial and horticultural crops. The remaining actuarial premium is subsidised by the government under applicable scheme provisions (Ministry of Agriculture and Farmers Welfare, 2016; Press Information Bureau, 2024).

Previous studies in Northern Karnataka indicate that institutional weaknesses reduce the usefulness of crop insurance. Delay in receiving claims was reported as the most important constraint among insured farmers, with a Garrett score of 73.5. Inadequate compensation was the next important constraint, with a Garrett score of 61.5. The available background study also found that approximately 44% of insured farmers had a low level of knowledge regarding crop-insurance schemes. These findings show that premium subsidy alone cannot create positive attitudes toward insurance. The scheme must also deliver adequate and timely compensation, clear information, transparent assessment, and accessible grievance redressal.

Research Methodology:

The study is based entirely on secondary data. The research design is descriptive and analytical in nature. Information has been collected from the Agriculture Census 2015–16, Government of Karnataka district statistical reports, PMFBY operational guidelines, Ministry of Agriculture and Farmers Welfare publications, Press Information Bureau releases, NABARD planning documents, and available research studies concerning crop insurance in Karnataka and Northern Karnataka.

Belagavi district is selected as the study area because of its importance in Karnataka agriculture, large concentration of small and

marginal holdings, diversified cropping pattern, and dominance in sugarcane cultivation. Karnataka-level data are used for comparison where district-specific data are not available.

The study analyses secondary information under the following themes:

- Landholding structure and farmer demographics.
- Crop pattern and agricultural risk environment.
- PMFBY premium provisions and insurance coverage.
- Crop insurance as an instrument for income and livelihood protection.
- Constraints affecting insurance effectiveness.
- Policy measures for strengthening crop insurance in Belagavi district.

The study does not estimate causal relationships or undertake econometric analysis. It interprets available statistical evidence and published research findings. Due to the limited availability of publicly accessible district-wise data on insured area, claims, claim amounts, and settlement time, the results should be interpreted as a secondary-data-based assessment.

Objectives of the Study:

1. To examine crop insurance as a financial risk-management tool for protecting farmers' income in Belagavi district.
2. To analyse the landholding pattern, crop structure, and agricultural risk environment of Belagavi district.
3. To assess the potential role of PMFBY in improving farm-income stability and livelihood security.
4. To identify major constraints affecting crop-insurance effectiveness and suggest policy recommendations for Belagavi district.

Farmer Demographics and Landholding Distribution:

Belagavi is an important agricultural district of Karnataka with a large rural population and significant dependence on crop cultivation. The district had approximately 5.47 lakh agricultural households in 2011. According to Agriculture Census 2015–16-related district information, Belagavi had around 6.20 lakh operational holdings.

The landholding structure is dominated by small and marginal holdings. Approximately 4.66 lakh operational holdings, representing around 75.2% of total holdings, were below two hectares. This proportion is higher than the Karnataka average of approximately 70% for small and marginal holdings. The predominance of small farms makes farmers more vulnerable to crop loss, debt, and income instability.

Table 1: Operational Holdings and Farm-Size Profile: Belagavi and Karnataka

Indicator	Belagavi District	Karnataka State	Interpretation
Total operational holdings	Approximately 6.20 lakh	—	Belagavi has a large agricultural base
Agricultural households	Approximately 5.47 lakh	—	Agriculture supports a large rural population
Small and marginal holdings below 2 ha	Approximately 75.2%	Approximately 70%	Smallholder agriculture is more concentrated in Belagavi
Approximate average holding size	Approximately 1.3 ha	Approximately 1.36 ha	Small holdings limit farmers' capacity to absorb crop losses
Nature of farm structure	Dominated by marginal and small farms	Dominated by small and marginal farms	Crop insurance is particularly relevant for vulnerable cultivators

Note. Small and marginal holdings refer to holdings below two hectares. Belagavi had approximately 6.20 lakh operational holdings, of which approximately 4.66 lakh were below two hectares. The average operational holding size for Karnataka was reported at 1.36 hectares (Agriculture Census, 2019; Government of Karnataka, 2021).

Belagavi's crop structure includes sugarcane, maize, paddy, pulses, turmeric, and other crops. Sugarcane occupies a large share of the cultivated area and represents a major source of agricultural income. Since sugarcane cultivation requires substantial investment in inputs, irrigation, labour, harvesting, and transport, crop losses can have serious consequences for household income and farm liquidity.

Table 2: Sugarcane Concentration and Agricultural Risk Context in Belagavi District

Indicator	Belagavi District	Karnataka Context	Significance for Crop Insurance
Sugarcane area	Approximately 293.19 thousand ha	Major share of state area	Indicates large financial exposure to sugarcane production risk
Share of Karnataka's sugarcane area	Approximately 46.61%	100%	Belagavi is a leading sugarcane-producing district
Sugarcane area, 2022–23	Approximately 2.6 lakh ha	—	Demonstrates high dependence on sugarcane cultivation
Sugarcane area, 2025–26	Approximately 3.0 lakh ha	—	Indicates an increasing trend in sugarcane area
Major crops	Sugarcane, maize, paddy, pulses, turmeric	Paddy, ragi, sugarcane, pulses	Shows a diversified but sugarcane-dominant crop economy
Production characteristics	Long-duration and high-input crop	—	Requires protection of working capital and income

Note. Belagavi accounted for approximately 46.61% of Karnataka's sugarcane area and covered approximately 293.19 thousand hectares under sugarcane cultivation in the cited study. The district report indicates that sugarcane area increased from approximately 2.6 lakh hectares in 2022–23 to around 3.0 lakh hectares in 2025–26 (Government of Karnataka, 2023; Indian Council of Agricultural Research, 2024).

Crop Insurance Coverage and Trends:

Crop insurance in India has developed through schemes such as the National Agricultural Insurance Scheme, the Weather-Based Crop Insurance Scheme, and PMFBY. PMFBY is intended to provide affordable insurance against crop loss and reduce the financial burden of production risk on farmers.

The financial benefit of PMFBY is mainly derived from the capped premium structure. Farmers pay only a small proportion of the sum insured, while the balance of the actuarial premium is subsidised by the government. This arrangement is especially relevant for smallholders, who may not otherwise be able to purchase commercial insurance.

Table 3: PMFBY Premium Structure and Financial Protection for Farmers

Crop category	Maximum premium paid by farmer	Government support	Financial implication
Kharif foodgrain and oilseed crops	2% of sum insured	Balance actuarial premium subsidised	Reduces upfront insurance cost
Rabi foodgrain and oilseed crops	1.5% of sum insured	Balance actuarial premium subsidised	Supports affordability during the Rabi season
Annual commercial and horticultural crops	5% of sum insured	Balance actuarial premium subsidised	Provides coverage for higher-value crops
Non-loanee farmers	Voluntary enrolment	Eligible subject to scheme provisions	Awareness determines participation
Loanee farmers	Linked with crop-finance systems	Institutional channels facilitate access	Banks can support enrolment and awareness

Note. The maximum premium payable by farmers under PMFBY is 2% for Kharif foodgrain and oilseed crops, 1.5% for Rabi foodgrain and oilseed crops, and 5% for annual commercial and horticultural crops (Ministry of Agriculture and Farmers Welfare, 2016; Press Information Bureau, 2024).

Belagavi was identified among Karnataka districts with a high number of insured farmers during 2017–18. However, district-wise figures regarding the total number of eligible farmers, total insured area, claims filed, claims paid, and claim-settlement time are not consistently available in the public domain. Therefore, the precise extent of crop-insurance coverage in Belagavi cannot be estimated from available secondary sources.

Crop Insurance, Farmers' Income, and Livelihood:

Crop insurance can contribute to farm-income stability and livelihood security in several ways. It can reduce the immediate financial effect of crop loss, preserve working capital, improve repayment capacity, and reduce distress borrowing. The scheme may also encourage farmers to invest in productivity-enhancing inputs because a part of their production risk is covered.

Table 4: Crop Insurance as a Financial Risk-Management Tool for Farm Income and Livelihood

Risk-management function	Crop-insurance mechanism	Expected income effect	Expected livelihood effect
Protection against crop loss	Compensation for insured crop loss	Reduces sudden fall in farm revenue	Protects household consumption
Protection of working capital	Claim amount provides post-loss liquidity	Helps purchase seeds, fertilizer, and inputs	Supports cultivation in the next season
Reduction in debt stress	Compensation may partly support loan repayment	Reduces dependence on informal borrowing	Lowers likelihood of distress sale of assets
Improved investment confidence	Insurance reduces perceived production risk	Encourages use of better inputs and technology	Strengthens farm resilience
Credit linkage	Insurance is linked with formal agricultural credit	Supports repayment capacity after losses	Improves continuity of institutional credit
Consumption smoothing	Compensation partly offsets income loss	Stabilises seasonal cash flow	Supports food, health, and education expenditure

Note. The benefits listed are expected financial and livelihood pathways. Their actual impact depends on enrolment, adequacy of the sum insured, proper loss assessment, claim amount, and timeliness of payment.

The contribution of crop insurance to livelihoods depends largely on timely claim settlement. A claim that is paid after the next sowing season may not adequately support farmers' immediate financial requirements. Similarly, inadequate compensation may not cover the cost of cultivation or the income lost due to crop damage. Hence, crop insurance should be evaluated not only by the number of farmers enrolled but also by the quality and timeliness of claim delivery.

Factors Influencing Attitude Toward Insurance:

Farmers' attitudes toward crop insurance are shaped by economic conditions, institutional performance, awareness, prior experiences, and trust in implementing agencies. Small and marginal farmers may find even subsidised premiums difficult to pay when they face high input costs, debt obligations, and household expenditure.

Institutional factors are especially important. Farmers may lose confidence in insurance when claims are delayed, compensation is inadequate, or loss assessment is not transparent. Available evidence from Northern Karnataka shows that delay in receiving claims was the most important constraint faced by insured farmers. Inadequate compensation was also a major problem. These issues directly reduce the usefulness of crop insurance as a financial risk-management instrument.

Table 5: Major Constraints Affecting Crop Insurance Effectiveness in Belagavi

Constraint	Available evidence	Effect on income and livelihood	Policy implication
Delay in claim settlement	Garrett Score: 73.5	Farmers may borrow or miss the next cropping season	Introduce time-bound claim settlement
Inadequate compensation	Garrett Score: 61.5	Claims may not cover cultivation costs or income loss	Review sum insured and scale of finance
Low insurance knowledge	Approximately 44% reported low knowledge	Farmers may not understand coverage and claim procedures	Strengthen insurance literacy programmes
Administrative complexity	Documentation and portal-related difficulties	May discourage enrolment and claims	Provide local enrolment and claim support
Lack of transparency	Concerns over loss assessment and official bias	Reduces trust in the scheme	Improve disclosure and grievance redressal
Weak local assistance	Limited insurance help centres	Increases transaction cost for small farmers	Establish taluk-level insurance cells
Limited district-level data	Incomplete public data on claims and payouts	Reduces accountability and policy assessment	Publish district-wise insurance statistics

Note. Delay in getting the claim received a Garrett score of 73.5, while inadequate compensation received a score of 61.5 in a study of insured farmers in Northern Karnataka. The background study also reported that 44% of insured farmers had low knowledge of crop-insurance schemes.

Information plays a crucial role in insurance participation. Farmers need to understand enrolment deadlines, notified crops, premium rates, sum insured, coverage conditions, crop-cutting experiments, claim procedures, and grievance mechanisms. Banks, Primary Agricultural Credit Societies, Farmer Producer Organisations, Krishi

Vigyan Kendras, and agricultural extension workers can play an important role in improving awareness.

Trust and perceived fairness are also essential. Farmers may be more willing to continue insurance when they receive timely and adequate compensation. On the other hand, negative experiences with claims can discourage both insured and non-insured farmers from participating in future seasons.

Policy Recommendations for Belagavi District:

Crop insurance in Belagavi can be strengthened through the following measures:

1. **Establish taluk-level crop-insurance facilitation centres.** These centres should assist farmers with enrolment, documentation, policy clarification, claim registration, correction of crop details, and grievance redressal.
2. **Strengthen insurance literacy programmes.** Awareness campaigns should be conducted before each crop season through village meetings, Kannada-language materials, radio, SMS, WhatsApp groups, banks, PACS, FPOs, and Krishi Vigyan Kendras.
3. **Ensure time-bound claim settlement.** The Agriculture Department, insurance companies, banks, and district administration should establish and publicly monitor season-wise claim-settlement targets.
4. **Improve transparency in loss assessment.** Crop-cutting experiments, weather data, satellite information, mobile-based field evidence, and local verification should be integrated to make assessment more transparent.
5. **Develop crop-specific insurance products.** Sugarcane insurance should account for long-duration cultivation, ratoon crops, irrigation dependence, and harvest-related risks. Coverage for maize, paddy, pulses, and turmeric should also reflect local production conditions.
6. **Strengthen the credit-insurance linkage.** Banks and cooperative institutions should provide clear information about crop insurance when disbursing crop loans and Kisan Credit Cards. Premium deductions and policy details should be clearly communicated.
7. **Simplify enrolment for smallholders.** FPOs, self-help groups, cooperatives, and village-level service centres can support group-based enrolment and reduce documentation difficulties.
8. **Publish district-level insurance data.** Regular publication of crop-wise, taluk-wise, and farmer-category-wise data would improve transparency and enable better policy evaluation.

Table 6: Suggested Monitoring Indicators for Crop Insurance in Belagavi District.

Indicator	Unit of measurement	Importance
Eligible farmers	Number	Shows potential coverage base
Insured farmers	Number and percentage	Measures scheme participation
Insured area	Hectares and percentage of cropped area	Indicates depth of coverage
Crop-wise enrolment	Farmers and hectares by crop	Identifies coverage gaps
Premium collected	₹ lakh or ₹ crore	Shows farmers' financial contribution
Government premium subsidy	₹ lakh or ₹ crore	Measures public support
Claims reported	Number and value	Indicates extent of loss exposure
Claims approved	Number and value	Measures assessment performance

Claims paid	Number, value, and percentage	Shows compensation effectiveness
Average settlement time	Number of days	Indicates timeliness of support
Claim rejection rate	Percentage	Reveals procedural or assessment issues
Grievances registered and resolved	Number and percentage	Measures accountability and service quality
Coverage of small and marginal farmers	Percentage	Shows inclusiveness of the scheme

Note. The above indicators should be published annually by the district administration, Agriculture Department, insurance companies, and financial institutions to assess the contribution of crop insurance to farm-income stability and livelihood security.

Data Gaps and Assumptions:

The study is subject to several limitations. First, publicly available district-level information on crop-insurance enrolment, insured area, premium collection, claims filed, claims paid, claim amounts, and settlement time is limited. Therefore, it is not possible to calculate a precise insurance penetration rate or claim-settlement ratio for Belagavi district.

Second, the landholding statistics are primarily based on Agriculture Census 2015–16-related information. Changes in land fragmentation, leasing arrangements, migration, crop diversification, and irrigation may have altered the present landholding structure.

Third, the study assumes that findings from Northern Karnataka are broadly relevant to Belagavi district because of similarities in agricultural conditions and institutional arrangements. However, this assumption requires verification through a primary survey of farmers in different taluks of Belagavi district.

Future research should collect farm-level data on age, education, farm size, income, crop pattern, irrigation access, credit use, insurance awareness, prior claim experience, digital literacy, and trust in insurance agencies. Such data can be analysed using descriptive statistics, Likert-scale attitude measurement, factor analysis, logistic regression, or ordered-logit models.

Conclusion:

Crop insurance has the potential to function as an important financial risk-management tool for farmers in Belagavi district. The predominance of small and marginal holdings, dependence on seasonal agricultural income, and concentration of high-investment crops such as sugarcane make income protection essential. PMFBY provides an affordable institutional framework through capped premium rates and government subsidy.

However, crop insurance can improve income stability and livelihood security only when farmers receive adequate and timely compensation. Delayed claim settlement, inadequate payouts, limited awareness, procedural difficulty, and weak transparency reduce the value of insurance for smallholders. The scheme must therefore be improved through stronger farmer education, local facilitation systems, transparent assessment procedures, crop-specific insurance design, timely claim payment, and district-level performance reporting.

A well-functioning crop-insurance system can reduce income shocks, protect working capital, support credit repayment, prevent distress borrowing, and help farmers continue cultivation after a crop-loss event. For Belagavi district, strengthening crop insurance can therefore contribute not only to agricultural risk management but also to broader livelihood resilience and rural economic security.

References:

1. Agriculture Census. (2019). *Agriculture Census 2015–16: All India report on number and area of operational holdings*. Department of Agriculture, Cooperation and Farmers Welfare, Government of India.
2. Government of Karnataka. (2021). *Agricultural statistics and operational holding reports*. Department of Economics and Statistics, Government of Karnataka.
3. Government of Karnataka. (2023). *Belagavi district at a glance and district statistical information*. Government of Karnataka.
4. Indian Council of Agricultural Research. (2024). *Growth dynamics of sugarcane in Belagavi district of Karnataka*.
5. Ministry of Agriculture and Farmers Welfare. (2016). *Pradhan Mantri Fasal Bima Yojana: Operational guidelines*. Government of India.
6. National Bank for Agriculture and Rural Development. (2023). *Potential linked credit plan: Belagavi district*. NABARD.
7. Press Information Bureau. (2024, August 6). *Revival of Fasal Bima Yojana*. Government of India.
8. Pradhan Mantri Fasal Bima Yojana. (n.d.). *PMFBY features*. Government of India.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Inclusive Development in Kerala: Economic Participation and Barriers Faced by Women with Disabilities

Dr. Sukanya S. Nair
Assistant Professor, Department of Economics,
NSS Hindu College, Chananacherry
Corresponding Author – Dr. Sukanya S. Nair
DOI - 10.5281/zenodo.23058273

Abstract:

Women with disabilities represent one of the most vulnerable and politically under-represented sections of society in Kerala. Although the state records superior performance in education, health, and human development relative to other Indian states, women with disabilities continue to face systemic exclusion from economic opportunities and social participation. Their vulnerability arises from the intersection of gender and disability, compounded by low educational attainment, limited access to employment, restricted mobility, and dependence on family members for daily needs. These overlapping disadvantages trap them in cycles of economic insecurity and social invisibility, even as mainstream development discourse often overlooks their specific financial burdens. This study investigates the economic participation and barriers encountered by women with disabilities in Kerala, with a focus on how their household expenditure patterns reflect deeper structural inequalities. The findings reveal that women with disabilities allocate a disproportionately large share of their monthly expenditure to healthcare, mobility, rehabilitation, and assistive technologies. These recurring and often unavoidable costs frequently exceed their earning capacity, especially for those who are unemployed, engaged in informal or low-wage work, or entirely dependent on caregivers. The study underscores the need to reorient Kerala's development agenda from welfare-based support to rights-based, participatory approaches that recognise disability-related costs and barriers.

Keywords: Expenditure Pattern, Economic Vulnerability, Inclusive Development, Sustainability.

Introduction:

Good health is an essential foundation of social development and human dignity. The World Health Organization (WHO) defines health as a state of complete physical, mental and social well-being, rather than merely the absence of disease or infirmity. It also recognizes the highest attainable standard of health as a fundamental human right. However, persons with disabilities particularly women continue to experience substantial barriers to realizing this right because of social exclusion, cultural prejudice, economic deprivation and inadequate access to healthcare.

Disability is a significant global concern. The WHO estimates that approximately 1.3 billion people, or 16% of the world's population, experience significant disability. In India, the 2011 Census recorded approximately 26.8 million persons with disabilities, representing 2.21% of the country's population. Of this population, 11.82 million were women. Kerala reported 761,843 persons with disabilities, constituting 2.28% of the state's population; women accounted for 367,137 of this total.

Women with disabilities face multiple and overlapping forms of disadvantage because of the combined effects of gender inequality and disability. Many experiences limited access to education, employment, healthcare, nutrition and social protection. Their participation in family life and community activities may be restricted, while stigma and negative stereotypes can cause feelings

of isolation, shame and diminished self-worth. In some communities, disability continues to be interpreted through beliefs related to fate or karma, reinforcing discrimination and discouraging individuals from seeking timely support and treatment.

Although Kerala has a wide range of medical and social-service systems, these facilities remain inaccessible to many women with disabilities, especially those living in poverty and struggling to meet their basic nutritional needs. Physical inaccessibility, financial constraints, lack of information, dependence on caregivers and social neglect further intensify their vulnerability. The limited public awareness surrounding their rights and needs also prevents their meaningful participation in mainstream development.

Therefore, women with disabilities in Kerala require focused attention within public health, social welfare and development policies. Ensuring accessible healthcare, adequate nutrition, livelihood opportunities, social security and community inclusion is essential for protecting their dignity and promoting equality. An inclusive approach that recognizes women with disabilities as rights-holders not merely as recipients of welfare is necessary to address their socio-economic and health challenges and enable their full participation in society.

Significance of the Study:

Differently abled persons constitute one of the most marginalised and helpless sections of society. Within this group, women face a particularly difficult situation because they experience discrimination at the intersection of gender and disability. This double disadvantage restricts their access to education, healthcare, employment and meaningful participation in social life. Many women with disabilities remain unmarried and socially isolated, while their opportunities for independent living and community engagement are severely limited. They are also exposed to various forms of abuse and violence, including sexual assault, forced prostitution and coercive reproductive practices. Evidence indicates that women with disabilities face greater barriers to education, employment, public services and protection from violence than many other groups.

The economic consequences of disability extend beyond the individual and often affect the entire household. Women with disabilities may require continuous assistance with daily activities, healthcare, rehabilitation, nutrition and mobility, thereby increasing the financial and caregiving responsibilities of family members. Frequent medical expenses from childhood can reduce household savings and weaken the family's overall economic security. In some cases, families, driven by desperation or misconceptions about disability, spend considerable amounts of money on unqualified practitioners and unscientific treatments in the hope of restoring the person's abilities. Such practices may deepen financial hardship while delaying access to appropriate care. Caregiving responsibilities can also compel family members particularly women to reduce their working hours, leave employment or retire prematurely. The resulting loss of income, together with rising disability-related expenditure, can push families into long-term economic vulnerability. Thus, disability affects not only health and social participation but also household income, savings, employment and living standards. Against this background, the present study focuses on the economic conditions of women with disabilities in Kerala. A deeper understanding of the issues is essential for developing inclusive policies that promote economic independence, protect dignity and enable women with disabilities to participate fully in social and economic life.

Objectives of the Study:

Major objectives of the study are,

1. To Compare the savings of differently abled and other family members

2. To analyse the economic status of differently abled women in Kerala by examining their expenditure patterns.

Methodology of the Study:

To examine the economic status of differently abled women both primary and secondary data were used. Secondary data was collected from WHO, Census and NSSO Reports, Annual reports of Dept. of Empowerment of Persons with Disabilities, Reports of Ministry of Social Statistics Division, Kerala Disability Census Report 2015, Various Health and ICDS reports. Primary data was collected through a household survey conducted in three districts of Kerala such as Thiruvananthapuram, Thrissur and Kozhikode on a rural-urban basis. A multistage random sampling technique was used for selecting the sample households. A total of 300 samples including 168 from rural area and 132 from urban area are selected for the present study. Economic status is measured using variables like expenditure on food items and non-food items. Economic impact may vary according to income, occupational status, and educational status. Also, it varies in accordance with the type of disability and bed-ridden status of the differently abled women. Hence all analysis is based on this categorization. Appropriate statistical analysis such as mean, standard deviation and percentage are used to analyse the data.

Analysis and Discussion:

The economic experiences of women with disabilities reflect the combined influence of disability, gender inequality and socio-economic disadvantage. The economic challenges of women with disabilities need to be understood not merely as consequences of impairment but as outcomes shaped by unequal social and economic structures. This section analyses and discusses the major economic issues experienced by women with disabilities.

Main Source of Financial Assistance:

Table:1shows main source of financial assistance of the respondents for meeting their day to day needs.

Table 1: Main source of financial assistance for meeting personal needs

Main source of financial assistance	No. of respondents	Percentage
Help from NGOs / Religious institutions	4	1.3
Help from relatives / Neighbours	43	14.3
Help from family	76	25.3
Benefits from government	121	40.4
Own employment	56	18.7
Total	300	100.0

Source: Field survey

Table:1 exhibits the result that only 18.8% have employment to meet their personal needs. 40.4% get social security pension from government. Even though the amount is small compared to their needs, it is a great relief for them. 43 respondents opined that they get constant help from relatives or neighbours for their day to day activities. Most of the employed category can spend their income according to their wish. But their unemployed counter parts have to depend on others for their personal needs.

Details of savings of the differently abled and the households:

Savings is one of the important economic variables which influence the standard of living of an individual. Here the researcher analyses savings of the differently abled women and other female member in the household. 10 respondents are staying alone. So, the sample size for other family members is 290 here. Out of 290, 6 families have no other female member. In this case the researcher analyses the savings of the male counterpart there.

Table 2: Comparison of savings of differently abled and other family members

Type of savings	Differently abled women			Other family members		
	Yes	No	Total	Yes	No	Total
Bank deposits	42 (14.0)	258 (86.0)	300 (100)	83 (28.6)	207 (71.4)	290 (100)
Post office savings	09 (3.0)	291 (97.0)	300 (100)	45 (15.5)	245 (84.5)	290 (100)
Gold savings	39 (13.0)	126 (87.0)	300 (100)	100 (34.5)	190 (65.5)	290 (100)
Insurance savings	04 (1.3)	296 (98.7)	300 (100)	56 (19.3)	234 (80.7)	290 (100)
Shares and equities	02 (0.7)	298 (99.3)	300 (100)	15 (5.2)	275 (94.8)	290 (100)
Private chitty	23 (7.7)	277 (92.3)	300 (100)	107 (36.9)	183 (63.1)	290 (100)
No assets	230 (76.7)	70 (23.3)	300 (100)	118 (40.7)	172 (59.3)	290 (100)

Source: Field survey

Note: Figures in brackets show percentages

From Table:2, it is clear that 76.7% of the differently abled women have no savings or assets to meet their needs. For those who have deposits in banks or other financial institutions, have significantly smaller amount as savings compared to other family members. Savings of other family members is also low. Analysisalso clarifies that while taking differently abled women, only 70 persons have any of the savings mentioned above and in the case of able-bodiedwomen, 172 persons owns any of the savings mentioned above.

Expenditure of differently abled women on the basis of various socio- economic and health indicators:

This section analyses the economic status of differently abled women. Here the researcher collected data from the families of 300 differently abled women both from rural and urban areas. Economic status is measured using variables like expenditure on food items and non-food items, particularly health, travel expenditure and miscellaneous expenditure. Health expenditure includes expenditure on medicines, assistive devices etc. Miscellaneous includes expenditure on clothing, cosmetics, recreation etc. Economic impact may vary according to income, occupational status, and educational status. Also, it varies in accordance with the type of disability and bed-ridden status of the differently abled women. Hence all analysis is based on this categorization.

Food and non-food expenditure according to different income groups:

The researcher here analyses the monthly expenditure on food items and non-food items including health, transportation and miscellaneous on the basis of monthly family income.

Table 3: Classification of food and non-food expenditure according to different income groups

Family income range	Frequency	Expenditure on food	Expenditure on non-food items			
			Health care	Transportation	Miscellaneous items	Total
Below 5000	N=19	M=857.89 SD=415.419	M=678.95 SD=713.037	M=323.68 SD=281.054	M=144.74 SD=114.133	M=1147.37 SD=939.633
5000-10000	N=54	M=1007.41 SD=237.003	M=885.19 SD=1222.958	M=468.52 SD=390.729	M=238.89 SD=116.824	M=1594.44 SD=1577.007
10000-15000	N=91	M=1145.05 SD=295.621	M=801.65 SD=852.527	M=481.87 SD=411.941	M=320.88 SD=183.040	M=1598.90 SD=1234.368

15000-20000	N=64	M=1275.00 SD=453.207	M=725.00 SD=735.063	M=450.00 SD=231.626	M=420.31 SD=213.942	M=1595.31 SD=920.219
20000-25000	N=42	M=1754.76 SD=562.747	M=1585.71 SD=1255.732	M=693.33 SD=430.556	M=478.57 SD=247.461	M=2752.86 SD=1600.877
25000 and above	N=30	M=2270.00 SD=574.246	M=2550.00 SD=2073.935	M=1165.00 SD=1080.561	M=753.33 SD=400.632	M=4451.67 SD=3080.738
Total	N=300	M=1327.67 SD=568.635	M=1077.17 SD=1257.813	M=560.57 SD=530.657	M=381.50 SD=266.024	M=2015.57 SD=1801.486

Source: Field survey

Table: 3 depicts that as income range increases, consumption on food and non-food expenditure of differently abled women also increases. Expenditure on health of the highest income group is almost four times higher than that of the lowest income group. Non-food expenditure including health and transportation expense is slightly lower in the income group 15000-20000, because it includes a greater number of speech and hearing differently abled women and their health and transportation expenses is comparatively low compared to other categories of differently abled women. It is also seen that expenditure on miscellaneous items of differently abled women is significantly lower compared to health and transportation expenditure because they spend low income on clothing, cosmetics, recreation etc.

Food and non-food expenditure according to the employment status:

The researcher here analyses whether the employment status have any impact on the food and non-food expenditure of differently abled women.

Table 4: Classification of food and non-food expenditure according to the employment status

Employment status	Frequency	Expenditure on food	Expenditure on non-food items			
			Health care	Transportation	Miscellaneous items	Total
Yes	N=56	M=1396.43 SD=704.780	M=1478.57 SD=1820.761	M=919.64 SD=852.093	M=506.25 SD=314.796	M=2899.11 SD=2648.850
No	N=244	M=1311.89 SD=533.007	M=985.04 SD=1072.703	M=478.16 SD=381.606	M=352.87 SD=245.436	M=1812.79 SD=1477.831
Total	N=300	M=1327.67 SD=568.635	M=1077.17 SD=1257.813	M=560.57 SD=530.657	M=381.50 SD=266.024	M=2015.57 SD=1801.486

Source: Field survey

Table:4 shows a significant and striking difference between the expenditure pattern of employed and unemployed category. Expenditure on food and non- food items of employed category is higher than that of the unemployed strata. Employed category can meet their increased demand on non-food expenditure particularly on health and transportation by themselves without depending on other family members. But for unemployed category it sometimes becomes an extra burden on other family members. It shows the importance of having a job for differently abled.

Food and non-food expenditure according to the educational status:

The researcher here analyses whether educational status of differently abled women have any influence in affecting their standard of living in terms of food and non-food expenditure.

Table 5: Classification of food and non-food expenditure according to the educational status

Educational status	Frequency	Expenditure on food	Expenditure on non-food items			
			Health care	Transportation	Miscellaneous items	Total
No schooling	N=108	M=1243.52 SD=559.251	M=888.89 SD=902.161	M=383.33 SD=253.849	M=274.07 SD=192.558	M=1547.22 SD=1183.686
Below 10th	N=73	M=1171.23 SD=392.810	M=1052.74 SD=1278.777	M=576.99 SD=407.017	M=337.67 SD=152.703	M=1964.66 SD=1621.167
SSLC	N=44	M=1343.18 SD=540.197	M=777.27 SD=736.069	M=420.45 SD=291.412	M=384.09 SD=159.859	M=1570.45 SD=1028.790
HSE	N=31	M=1303.23 SD=508.254	M=1435.48 SD=1482.464	M=687.10 SD=531.502	M=474.19 SD=329.614	M=2596.77 SD=2108.947
U.G.	N=37	M=1718.92 SD=685.094	M=1354.05 SD=1746.360	M=966.22 SD=962.928	M=618.92 SD=370.314	M=2925.68 SD=2698.447
P.G. and above	N=4	M=1850.00 SD=100.000	M=2125.00 SD=750.000	M=775.00 SD=450.000	M=675.00 SD=567.891	M=3575.00 SD=809.835
Professional degree	N=3	M=2666.67 SD=288.675	M=4333.33 SD=2886.751	M=2000.00 SD=1000.00	M=1000.00 SD=100.000	M=7333.33 SD=3153.305
Total	N=300	M=1327.67 SD=568.635	M=1077.17 SD=1257.813	M=560.57 SD=530.657	M=381.50 SD=266.024	M=2015.57 SD=1801.486

Source: Field survey

Food expenditure of differently abled women with educational status higher than that of HSE shows a considerable difference than that of the others with lower educational status. Taking non-food expenditure this difference can be seen from the HSE category itself. Non-food expenditure including health and transportation in the SSLC group is slightly lower since it includes a greater number of differently abled with speech and hearing disability. In the case of miscellaneous expenditure, it shows an increasing trend with the educational status.

Food and non-food expenditure according to various categories of disability:

The analysis here focuses on the food and non-food expenditure of differently abled according to various categories of differently abled women such as visual, physical, hearing, speech, mental retardation, mental illness and multiple disabilities.

Table 6: Classification of food and non-food expenditure according to various categories of disability

Type of disability	Frequency	Expenditure on food	Expenditure on non-food items			
			Health care	Transportation	Miscellaneous items	Total
Visual disability	N=44	M=1277.27 SD=573.388	M=1186.36 SD=1203.984	M=531.82 SD=353.568	M=411.36 SD=354.516	M=2129.55 SD=1727.154
Physical disability	N=76	M=1348.68 SD=657.57	M=1640.13 SD=1772.381	M=910.53 SD=779.543	M=378.29 SD=230.844	M=2922.37 SD=2479.131
Hearing disability	N=34	M=1300.00 SD=386.907	M=767.65 SD=878.608	M=407.35 SD=265.185	M=536.76 SD=268.359	M=1711.76 SD=1261.976
Speech disability	N=22	M=1318.18 SD=392.351	M=636.36 SD=456.222	M=395.45 SD=181.206	M=513.64 SD=267.787	M=1531.82 SD=815.555
Mental retardation	N=62	M=1317.74 SD=540.651	M=553.23 SD=721.273	M=351.94 SD=349.969	M=246.77 SD=192.028	M=1150.32 SD=1140.423
Mental illness	N=21	M=1380.95 SD=688.926	M=1061.90 SD=715.874	M=438.10 SD=231.249	M=328.57 SD=205.287	M=1828.57 SD=976.802

Multiple disability	N=41	M=1358.54 SD=598.739	M=1209.76 SD=1155.380	M=536.59 SD=444.835	M=386.59 SD=242.648	M=2128.05 SD=1558.607
Total	N=300	M=1327.67 SD=568.635	M=1077.17 SD=1257.813	M=560.57 SD=530.657	M=381.50 SD=266.024	M=2015.57 SD=1801.486

Source: Field survey

It is observed that food expenditure does not vary considerably across various categories of disability. Expenditure on non-food items is significantly high compared to food items among all categories of differently abled women except the mentally retarded category, physically differently abled category being the highest. This difference is same while considering expenditures on health and transportation. Increased expenditure on health is due to the extra need of assistive devices along with medical expenses. It also depicts that non-food expenditure including health and transportation of hearing and speech differently abled is lower than other categories except mentally retarded. Low expenditure of non-food items including health, transportation and miscellaneous items of mentally retarded clearly shows the degree of negligence they face even in the family circle to meet their basic and subsistence needs. Most of them do not avail any medical attention which makes the mentally retarded category more vulnerable. Many of them are forced to stay inside the home and it makes their status more deplorable.

Food and non-food expenditure according to bed ridden status:

Bed ridden status is a very important variable which affects differently abled women's livelihood. It directly influences their mobility, educational, employment and marital status. Here the researcher analyses the bed ridden status with food and non-food expenditure.

Table 7: Classification of food and non-food expenditure according to bed ridden status

Bed ridden	Frequency	Expenditure on food	Expenditure on non-food items			
			Health care	Transportation	Miscellaneous items	Total
Yes	N=33	M=1575.76 SD=725.013	M=1351.52 SD=1220.687	M=419.70 SD=371.218	M=301.52 SD=183.066	M=2072.73 SD=1534.198
No	N=267	M=1297.00 SD=540.042	M=1043.26 SD=1260.405	M=577.98 SD=545.149	M=391.39 SD=273.175	M=2008.50 SD=1834.218
Total	N=300	M=1327.67 SD=568.635	M=1077.17 SD=1257.813	M=560.57 SD=530.657	M=381.50 SD=266.024	M=2015.57 SD=1801.486

Source: Field survey

Expenditure for food is higher for bed ridden due to the extra diet and the special supplements. Non- food expenditure also shows a slight increase due to the high health care needs. But the transportation and miscellaneous expenditure are higher for the non- bedridden category.

Conclusion:

Differently abled women constitute one of the most underprivileged groups in society and experience widespread discrimination across social contexts. Situated at the intersection of gender and disability, they often occupy a marginalised status both within the community of persons with disabilities and within the broader category of women. Main source of financial assistance of the respondents for meeting their day to day needs is the social security pension. Majority of the differently abled women have no savings or assets to meet their needs. Economic status measured using variables like expenditure on food items and non-food items, particularly heath, travel expenditure and miscellaneous expenditure according to income, occupational status,

educational status, type of disability and bed-ridden status showed that they have a deplorable state of living.

Policy Recommendations:

Inflation-Indexed Disability Pensions: Disability pensions should be automatically revised each year in line with inflation to ensure benefits keep pace with rising costs of food, healthcare, and mobility.

Livelihood-Centred Economic Support: Policies must prioritise income-generating opportunities by expanding skill-development programmes, promoting home-based work, and enabling flexible employment options for persons with disabilities.

Subsidised Health and Mobility Services: Free or concessional healthcare, assistive devices, and accessible transport should be guaranteed to reduce high out-of-pocket expenses, especially for women with severe disabilities.

Financial Inclusion and Asset Creation: Access to savings accounts, affordable credit, and asset-building schemes must be strengthened to improve long-term economic security for disabled individuals and their households.

District-Specific Gender-Sensitive Planning: Decentralised, gender-responsive interventions should be designed and implemented in districts with higher concentrations of women with disabilities to address localised barriers and needs.

References:

1. Albrecht, Gary. L., Seelaman, Katherine. D., &Buey, Micheal.(2001). Handbook of Disability Studies. Thousand Oaks, London: Sage Publications.
2. Altman, B. M. (2001). Disability definitions, models, classification schemes, and applications. In G. L. Albrecht, K. D. Seelman, & M. Bury (Eds.), Handbook of disability studies. Thousand Oaks, CA: Sage Publications.
3. Barik, S. (2009). Disabled in India. New Delhi: Adhyayan Publishers and Distributors.
4. Bhambani, M. (2003). Societal responses to women with disabilities in India. In A. Hans & A. Patri (Eds.), Women, disability and identity. New Delhi: Sage Publications.
5. Bhuimali, Anil. (2009). Rights of disabled women and children in India, New Delhi: Serials publications.
6. Deegan, M. J., & Brooks, N. A. (1985). Women and disability: The double handicap. New Brunswick, NJ: Transaction Books.
7. GOK .(2015). Kerala Disability Census Report,2015. Thiruvananthapuram: Social Security Mission.
8. Goodley, Dan.(2011).Disability Studies-An Interdisciplinary Introduction. New Delhi: Sage Publications India Pvt Ltd.
9. Government of India (GOI). (2001). National human development report. New Delhi: Planning Commission, Government of India.
10. Hans, Asha and Patri, Annie. (2003). Women, Disability and Identity. New Delhi: Sage Publications.
11. Malkani, A. K. (2008). The welfare of the disabled. New Delhi: Mohit Publications.
12. Mitra, S., &Sambamoorthi, U. (2006). Government programmes to promote employment among persons with disabilities in India. Indian Journal of Social Development, 6(2).
13. NSSO.(2002). Disabled Persons in India: NSSO, 58th Round. Report No.485, New Delhi: Ministry of Statistics and Programme Implementation, GOI.
14. Raja, M. G. B. (2007). Economic welfare measures for persons with disabilities. New Delhi: Serials Publications.
15. World Health Organization (WHO). (2011). World report on disability. Geneva: World Health Organization.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Comparative Study of India's Trade Competitiveness with Key Emerging Economies an Analytical Study

Dr. Ajit Kadam[1] & Dr. Ningappa Koujageri[2]

[1] *HOD & Assistant Professor of Economics, Government First Grade College Patrakartanagara Hubballi 580032 State: Karnataka.*

[2]*HOD &Assistant Professor of Economics, KLE Society SVS Bellubbi Arts & Commerce College, Saundatti-591126. Tq: SaundattiDist: Belagavi, Sate: Belagavi. State. Karnataka.*

Corresponding Author – Dr. Ajit Kadam

DOI - 10.5281/zenodo.23058286

Abstract:

This paper examines India's export growth from 2018-19 to 2023-24, analyzing the country's trade share, global ranking, and key export partners. It highlights India's evolving role in international trade, emphasizing its strengths in sectors such as information technology, pharmaceuticals, and engineering goods. The study delves into critical competitiveness parameters, including GDP growth, labour costs, and R&D investment, identifying both areas of excellence and those requiring improvement. By comparing India's trade dynamics with those of key emerging economies such as China, the USA, Brazil, and ASEAN nations—the paper discusses the strengths and weaknesses of India's global trade competitiveness. It considers factors like market diversification, trade policy, and the impact of geopolitical developments on India's trade relationships. Through this comparative analysis, the paper aims to provide insights for policymakers and stakeholders on strategies to enhance India's position in the global marketplace. Ultimately, this research underscores the importance of leveraging India's competitive advantages while addressing challenges to sustain and accelerate export growth in an increasingly complex international trade environment.

Keywords: India, Export Growth, Trade Competitiveness, Global Ranking, Emerging Economies.

Introduction:

The global economic landscape is increasingly shaped by the competitive dynamics among emerging economies, each vying for a greater share in international trade and influence in the global market. India, as one of the world's fastest-growing economies, is positioned alongside key emerging economies like China, Brazil, Russia, and nations within the ASEAN bloc, all of whom contribute significantly to global trade flows. A comparative study of India's trade competitiveness vis-à-vis these economies is essential to understand both its strengths and areas requiring strategic attention.

India's trade competitiveness can be evaluated through various lenses, including export performance in sectors like IT services, pharmaceuticals, biotechnology, electronics, and manufactured goods. Each of these sectors reveals both the potential and the limitations of India's export capabilities compared to other emerging economies. For instance, India leads in IT and pharmaceutical exports, which reflects its strength in software development and generics manufacturing, yet it significantly lags in high-tech electronics and advanced biotechnology, where countries like China dominate. Furthermore, India's relatively low R&D investment and limited production scale in high-tech industries highlight an area of potential improvement in its trade strategy.

This analytical study will also consider non-trade factors affecting competitiveness, such as ease of doing business, labour costs, and the availability of skilled labour, all of which influence India's

position in global trade. Understanding these comparative metrics helps pinpoint where India holds distinct advantages—such as in cost-effective labour for manufacturing—and where it faces challenges, including limited R&D spending and technology integration in advanced fields. By examining India's trade dynamics alongside other key economies, this study aims to provide insights into how India can leverage its strengths and address its shortcomings to enhance its trade position in a highly competitive international environment. The findings will be particularly valuable for policymakers and business leaders in devising strategies that enhance India's global trade footprint.

The table-1 resent the India's export indicators from 2018-19 to 2023-24, India's export growth exhibited fluctuations in both goods and services. In 2018-19, export values grew by 7.9%, slowing to 2.9% in 2019-20, with goods volume increasing 6.0% to 1.5% and services growth declining from 8.5% to 5.0%. This slowdown was due to global economic uncertainties and weaker demand.

Table-1: Indicators of India's Export Growth

(Annual Percentage of Change)

Years	Export Value (Goods & Services) % Change	Export Volume (Goods) % Change	Export Volume (Services) % Change
2018-19	7.9	6.0	8.5
2019-20	2.9	1.5	5.0
2020-21	-10.2	-12.5	0.2
2021-22	34.3	20.3	22.8
2022-23	13.5	10.7	18.6
2023-24	2.4	-3.1	7.6

Source: RBI Database on Indian Economy. 2023-24.& Various Indian Economic Survey.

The table-1 represent India's export growth indicators, India's export landscape has undergone notable shifts in recent years. The COVID-19 pandemic led to a 10.2% fall in export values and a 12.5% drop in goods volume in 2020-21 due to lockdowns and supply chain disruptions, though service exports, buoyed by IT and digital sectors, edged up 0.2%. The following year, 2021-22, saw a robust recovery with export values surging 34.3% and goods and services volumes rising 20.3% and 22.8%, respectively, driven by global economic rebound, pent-up demand, and supportive policies. In 2022-23, export growth slowed to 13.5%, with goods up 10.7% and services 18.6%, impacted by inflationary pressures and tighter monetary policies. By 2023-24, export values grew just 2.4%, goods volume fell 3.1%, and services grew 7.6% amid global challenges, underscoring the vulnerability of goods and resilience of services.

Over time, India's role in global trade, especially in commercial services, has strengthened. From 11th place in 2005 with a 2.32% share, India rose to 6th in 2013 and has since ranked between 7th and 8th. By 2022, India's global services share reached 4.38%, reflecting its growing capacity in digital and knowledge services, particularly IT and BPO.

Table-2: India's Commercial Service Rank and share in world Trade

(*In Percent)

Year	Export		Import	
	Rank	Share*	Rank	Share*
2005	11	2.32	13	2.22
2006	10	2.68	13	2.41
2007	9	2.73	13	2.50
2008	9	2.72	13	2.40
2009	12	2.61	12	2.54
2010	7	3.34	7	3.31
2011	8	3.28	7	3.13
2012	7	3.23	7	3.07
2013	6	3.25	9	2.84
2014	8	3.15	8	3.07
2015	8	3.27	10	2.65
2016	8	3.35	10	2.83
2017	8	3.47	10	3.02
2018	8	3.54	10	3.2
2019	8	3.52	10	3.11
2020	7	4.12	10	3.33
2021	8	4.0	10	3.52
2022	7	4.38	9	3.82

Source: Various issues of World Trade Profile.

In commercial services imports, India's rank rose from 13th in 2005 to as high as 7th in 2010-2011, and later stabilized between 9th and 10th, with a steady rise in share from 2.22% in 2005 to 3.82% in 2022. This increase reflects India's growing consumption of specialized global services, supporting domestic industries and economic activities.

India's role in merchandise trade is more volatile, shaped by global conditions and domestic policies. Starting from 29th in exports in 2005, India climbed to 18th by 2022, with its share in global exports doubling from 0.91% to 1.82%, reflecting an expanding industrial base. However, its merchandise trade share remains lower than in services, highlighting a relatively lower participation in global goods trade.

Merchandise imports showed consistent growth, with India's rank rising from 17th in 2005 to 9th in 2022, reaching a 2.81% share due to rising demand for raw materials and technology imports crucial for its manufacturing sector.

Table-3: India's Merchandise Trade Rank and share in world Trade

(In Percent)

Year	Export		Import	
	Rank	Share	Rank	Share
2005	29	0.91	17	1.25
2006	28	1	17	1.41
2007	26	1.04	18	1.52
2008	27	1.1	16	1.79
2009	21	1.3	14	1.97
2010	20	1.44	13	2.12
2011	19	1.67	12	2.51
2012	19	1.6	10	2.63
2013	19	1.66	12	2.47
2014	19	1.69	12	2.43
2015	19	1.62	13	2.34
2016	20	1.65	14	2.21
2017	20	1.68	11	2.48
2018	19	1.67	10	2.57
2019	18	1.71	10	2.53
2020	21	1.57	14	2.09
2021	18	1.77	10	2.55
2022	18	1.82	9	2.81

Source: Various issues of World Trade Profile.

The table 4 data presents the data from 2018-19 to 2023-24 on India's export partnerships with key trade partners—the USA, China, UAE, Saudi Arabia, and the European Union—reveals shifts in demand, policies, and India's strategic positioning. The USA consistently leads as India's top export partner, with its share rising from 15.88% in 2018-19 to 18.05% in 2021-22, dipping slightly to 17.41% in 2022-23, before stabilizing at 17.74% in 2023-24. This trend reflects India's competitive advantage in sectors such as IT services, pharmaceuticals, and engineering goods, alongside strong policy collaboration. Minor fluctuations may be due to global economic factors like U.S. inflation, but the relationship remains resilient overall.

Table 4: India's Major Export Trade Partners

(In percentage to total India's Export)

Years	USA	China	UAE	Saudi Arabia	European Union
2018-19	15.88	5.08	9.13	1.68	15.29
2019-20	16.94	5.30	9.21	1.99	15.14
2020-21	17.69	7.26	5.72	2.01	12.18
2021-22	18.05	5.04	6.65	2.08	12.99
2022-23	17.41	3.39	7.01	2.38	14.29
2023-24	17.74	3.81	8.15	2.64	14.72

Source: Computed from RBI Database on Indian Economy.

China's position is more volatile, peaking at 7.26% in 2020-21 but declining sharply to 3.39% in 2022-23 and slightly recovering to 3.81% in 2023-24. This trend reflects India's efforts to reduce reliance on China amid geopolitical tensions and the "Atmanirbhar Bharat" initiative, which encourages self-reliance and supply chain diversification. Additionally, China's economic slowdown and global supply chain disruptions have affected bilateral trade, leading India to seek stronger ties with alternative markets like the U.S. and EU.

The UAE shows a dynamic pattern, with a decline from 9.13% in 2018-19 to 5.72% in 2020-21, followed by a recovery to 8.15% in 2023-24. The initial drop mirrors economic challenges in the Gulf, while the recovery reflects India's strengthened ties with the UAE and GCC countries through trade agreements, benefiting sectors like textiles, jewelry, and food products. The UAE's role as a trading hub also grants India access to Middle Eastern and African markets, enhancing its competitive edge, overall, the data underscores India's export resilience, with strategic diversification efforts and robust partnerships in key regions shaping its trade competitiveness.

Table-5: Global Competitive Indicators with Selected Nations

Indicator	Brazil	South Africa	Russia	India	China	Bricks Average
GDP (USD Trillions)	1.87	0.4	2.1	3.73	17.4	5.1
GDP Growth Rate (%)	2.9	1.8	2.6	6.1	5.2	3.7
Inflation Rate (%)	9.3	6.9	5.2	5.3	1.8	5.7
Unemployment Rate (%)	9.1	29.9	4.3	7.8	5.3	11.3
Ease of Doing Business Ranking	124	84	28	63	31	66
Manufacturing Output (% of GDP)	10.7	12.4	14.3	17.4	26.2	16.2
Exports (USD Billions)	302.1	94.3	546.6	674.0	357.4	1040.9
Foreign Direct Investment (FDI) Inflow (USD Billions)	50.5	7.8	37.4	49.3	334.0	95.8
Human Development Index (HDI)	0.754	0.790	0.822	0.633	0.768	0.737
Poverty Rate (% below national line)	23.3	49.2	12.3	21.9	3.1	21.9
Renewable Energy Usage (% of Total)	45.5	16.6	17.2	40.1	27.3	29.3

Source: World Bank, IMF, UNDP, ILO, UN Comtrade, and the International Energy Agency.

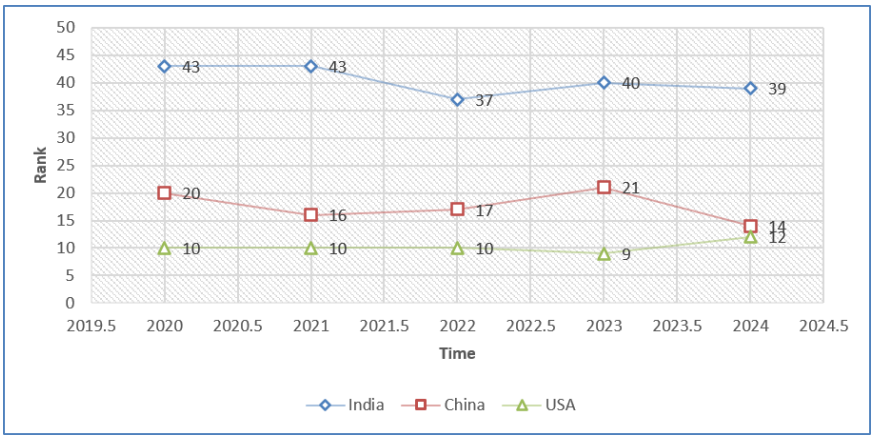
The table 6 represents the India's economic indicators within the BRICS context showcase both strengths and areas for improvement in its competitiveness. With a GDP of $3.73 trillion, India is the second-largest economy in the BRICS group after China, highlighting its substantial economic base. India also leads in GDP growth rate at 6.1%, signaling strong economic momentum and potential for expansion. However, challenges remain in areas such as unemployment, with a rate of 7.8%, higher than China and Russia, reflecting structural issues in the labor market and the need for job creation to support its growing population.

In the realm of business environment, India ranks 63rd on the Ease of Doing Business index, a moderate position that reflects some recent improvements but also indicates further room for simplification in regulatory and bureaucratic processes compared to Russia's 28th rank and China's 31st. India's manufacturing output is 17.4% of GDP, showing a strong manufacturing sector relative to most BRICS countries, but still lagging behind China's 26.2%. This suggests that India could benefit from policies that enhance manufacturing efficiency and increase its share in global supply chains.

India's FDI inflow of $49.3 billion signifies its appeal as an investment destination, but it remains overshadowed by China's massive $334 billion inflow, pointing to the potential for further reforms to attract more foreign capital. Additionally, India's renewable energy usage is relatively high at 40.1%, showcasing commitment to sustainable energy, yet still less than Brazil's impressive 45.5%. Overall, while India has clear strengths in growth and investment attractiveness, further focus on labor market reform, ease of doing business, and sustainable energy adoption could strengthen its competitive standing among the BRICS nations.

India, China, and the United States remain pivotal in global economic competitiveness, with their rankings on the IMD World Competitiveness Index reflecting both strengths and areas for improvement.

Figure 1: Competitive Rank of India along with China and USA



Source: IMD Competitive Index Year Book

Figure-1 represent the India's global commutative ranking, along with USA and China. India's ranking showed modest fluctuation, steady at 43rd in 2020-2021, rising to 39th in 2022, dipping slightly to 40th in 2023, and returning to 39th in 2024. This trend highlights slow but steady competitiveness gains, largely from policy reforms, digitalization, and innovation. Yet, the minor 2023 setback signals areas for development, such as infrastructure and regulatory efficiency. Economically, India ranks 5th globally in GDP at $3,558.1 billion and 64th in GDP per capita (PPP) at $9,339, with an unemployment rate of 8.0% and direct investment inflows at 1.44% of GDP. These

metrics emphasize areas India could strengthen to enhance its global position further.

China's ranking trajectory improved steadily, from 20th in 2020 to 14th in 2024, driven by strategic investments in technology, infrastructure, and innovation. China holds the 2nd position globally in GDP at $17,794.8 billion, although its 54th rank in GDP per capita (PPP) at $23,361 suggests room for income distribution improvements. China ranks 2nd in inward investment stocks, attracting $3,822 billion, underscoring its appeal as a key investment destination. A low unemployment rate of 5.2% further bolsters its stability, supporting competitiveness.

The U.S. consistently ranked high, at 10th from 2020-2022, advancing briefly to 9th in 2023, then falling to 12th in 2024. This decline suggests emerging challenges despite its leadership in technology and innovation. The U.S. remains the world's largest economy with a GDP of $27,348.0 billion and ranks 7th in GDP per capita (PPP) at $81,632, indicating high individual wealth. However, with investment inflows at 1.11% of GDP, the U.S. shows signs of diversification challenges. Addressing supply chain and labor market constraints may be vital to sustaining its competitive edge.

Overall, India's gradual rise in competitiveness, China's focused ascent, and the U.S.'s strong yet slightly challenged position highlight their unique paths and evolving roles in the global economic landscape.

Major Finding:

- Due to Covid-19 disruption India's export fell down by 10.2% in overall good and service.
- India's export strongly recover after Covid-19 pandemic, export increased by 34.3% during 2021-22.
- During 2023-24 due the headwinds, goods volume export reduced by -3.1% nevertheless service exports grew by 7.6%
- India has good comparative advantage in service sector, as a witness of this commercial service export rank rise to 7 with 4.38% of share in 2022. From 11th in 2005.
- Merchandise Trade: India's merchandise exports showed more volatility, ranking 29th in 2005 and climbing to 18th in 2022, with its share doubling from 0.91% to 1.82%.
- India' export witness of more volatility, even thought rank and share increased to 18th and 1.82% of share in world economy respectively.
- USA remains as India's top export partner, with 17.74% in 2023-24, the major contributors sectors are IT, pharma and engineering goods.
- Other hand China's share in export as well as in import is more volatile and declined to 3.81 % in 2022-23 from 7.26% in 2020-21, this may be due to the geopolitical tensions and India's self-reliance initiatives.
- In this study period UAE trade value increased to 8.15% in 2023-24 from 5.72% in 2020-21, this may the result of trade agreements and GCC region access.
- Comparatively the BRICS economic indicators India hold second largest economy with the highest GDP growth rate 6.1%, but facing the high unemployment (7.8%) problem.
- Ease of Doing Business: India ranks 63rd, showing moderate improvement.
- India's global ranking improved from 43rd in 2020 to 39th in 2024, reflecting gains from digitalization and policy reforms, though infrastructure and regulatory hurdles remain areas to address.

  In global Competitiveness ranking India climbed to 39 in 2023 from 43 in 2020, were as China's rank rose to 14 in 2020 from 20 in 2022, and USA stable in competitiveness rank.

Reference:

1. International Monetary Fund. (2023). *World economic outlook: Countering the cost-of-living crisis*. Retrieved from https://www.imf.org/en/Publications/WEO
2. Ministry of Commerce and Industry, Government of India. (2023). *Annual report on foreign trade policy*. New Delhi: Author. Retrieved from https://commerce.gov.in
3. Mukherjee, S. (2022). The role of technology in enhancing India's export competitiveness. *Asian Economic Policy Review, 17*(1), 99-117. https://doi.org/10.1111/aepr.12336
4. Purfield, C. (2005). *Maintaining competitiveness in the global economy*. [IMF].https://www.elibrary.imf.org/display/book/9781589065680/ch04.xml
5. Ramesh, V., & Kumar, P. (2023). Competitiveness indicators in global trade: A case study of India. *Economic and Political Weekly, 58*(7), 22-29.
6. Reserve Bank of India. (2023). *Report on currency and finance*. Retrieved from https://www.rbi.org.in
7. Sharma, R. (2021). India's trade competitiveness: An analysis of export dynamics. *Journal of International Trade and Economic Development, 30*(3), 405-422. https://doi.org/10.1080/09638199.2020.1863436
8. UNCTAD. (2022). *Trade and development report 2022*. United Nations Conference on Trade and Development. Retrieved from https://unctad.org/webflyer/trade-and-development-report-2022
9. World Bank. (2023). *World development indicators: Trade and investment*. Retrieved from https://data.worldbank.org/indicator/NE.EXP.GOODS.CD.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Sustainable Development and Rural–Urban Transformation in Karnataka, India

Shashikumar Totad[1] & Dr. Saraswati H. Bammanal[2]

[1]*Research Scholar, Department of Economics,*

Karnataka Folklore University, Gotagodi, Shiggavi, Karnataka, India.

[2]*Research Guide; Assistant Professor & HOD, Department of Economics,*

RTE Society's Arts, Science and Commerce Degree College, Ranebennur, Karnataka, India.

Corresponding Author – Shashikumar Totad

DOI - 10.5281/zenodo.23058309

Abstract:

Rural–urban transformation is often judged by the growth of towns and the movement of workers out of agriculture. Neither measure establishes whether households become more secure or whether development remains within ecological limits. This article examines that distinction for Karnataka, India, by connecting structural transformation, expected-income theory and territorial governance. It asks when improved urban access translates into durable livelihood gains after employment uncertainty, commuting expenses, paid care and housing pressures are considered. The study combines verified secondary population evidence with an original household-welfare model and a proposed sequential explanatory mixed-method field study. The fieldwork design covers 480 households in 32 settlements across four contrasting Karnataka study areas, followed by interviews and group discussions. No primary observations have been collected for this manuscript; all numerical scenarios are explicitly assumed accounting examples, not estimated treatment effects. Official historical data show that Karnataka's urban population increased from 17.96 million in 2001 to 23.63 million in 2011, while its rural population also increased. The analytical exercise demonstrates why this redistribution cannot itself establish sustainable development. Under stated assumptions, an urban-access pathway raises expected monthly earnings substantially but increases disposable resources by only two percent once access costs are deducted. A coordinated service pathway produces a larger gain, although that ranking weakens when employment reliability falls or housing costs rise. The article identifies job continuity, affordable mobility, care provision, secure occupancy and shared ecological management as complementary conditions rather than independent policy objectives. Its contribution is a transparent framework for evaluating rural–urban linkages without confusing urban expansion with household welfare. Policy priorities include functional-region planning, accountable service finance and distribution-sensitive monitoring. Empirical conclusions about Karnataka require implementation of the proposed survey and independent environmental measurement.

Keywords: Sustainable Development; Rural–Urban Linkages; Karnataka; Structural Transformation; Migration; Commuting; Household Welfare; Employment Security; Pier-Urbanization; Spatial Inequality; Ecological Governance; Mixed Methods.

Introduction:

For a rural household, development may mean reaching a dependable job without surrendering affordable housing, family care or access to water. The central issue is therefore not movement towards a city alone, but whether the opportunities gained exceed the costs incurred. This article develops that distinction into a Karnataka-focused research framework and a testable fieldwork design.

Its organizing proposition is that connectivity becomes developmental only when households can use it on sustainable terms. The contribution is threefold: a net-resource measure that makes participation costs visible, a research design linking households to settlement services,

and an explicit separation between financial gains and ecological performance. This approach accommodates commuting, migration and locally based non-farm work without prescribing a single desirable destination for rural labour.

Background and Research Context:

Karnataka's historical population record illustrates transformation without rural disappearance. Between 2001 and 2011, urban population grew by 31.54 percent and rural population by 7.40 percent. The urban share rose from 33.99 to 38.67 percent. These are historical census comparisons, not estimates for 2026; they establish a baseline rather than a contemporary migration rate (Ministry of Housing and Urban Affairs, 2019).

Table 1: Karnataka's historical rural–urban population baseline

Indicator	2001	2011	Change
Total population (Million)	52.851	61.095	+15.60%
Rural population (Million)	34.889	37.469	+7.40%
Urban population (Million)	17.962	23.626	+31.54%
Urban share (percent)	33.99	38.67	+4.68pp

Source/status: *Ministry of Housing and Urban Affairs (2019), census-based population-by-residence table; author calculations from unrounded counts.*

Interpretation: *Both populations increased. Urban growth includes natural increase and reclassification, so it cannot be attributed entirely to migration*

The proposed study treats Bengaluru's outer region, the Mysuru region, Dharwad's settlement network and Kalaburagi's hinterland as contrasting research sites, not statistically representative substitutes for Karnataka. Their selection would permit comparison of metropolitan access and smaller urban labour markets. Travel time and service use would define functional connections alongside official settlement categories.

This design recognizes three distinct processes: a change in administrative status, a change in household occupation, and a change in connections to surrounding places. They need not coincide. A village resident might commute daily while retaining agricultural income; a newly classified town might still depend on insecure local work. Keeping residence, workplace and income source separate would prevent the survey from treating these different transitions as one phenomenon.

Problem Statement:

An urban wage premium can coexist with insecurity when irregular work, transport charges and new living expenses absorb the gain. A settlement may also acquire urban characteristics while neighboring jurisdictions retain responsibility for its water, waste or roads. The research problem is to measure household returns and territorial costs together, without assuming that non-farm employment is necessarily better employment.

Research Objectives and Questions:

The objectives are to distinguish settlement change from livelihood improvement, measure the costs of accessing urban opportunities, identify unequal transition burdens, and assess coordination needs. The questions are: Does better access increase net resources? Who cannot use it? Do service improvements strengthen gains? What ecological burdens remain outside household accounts?

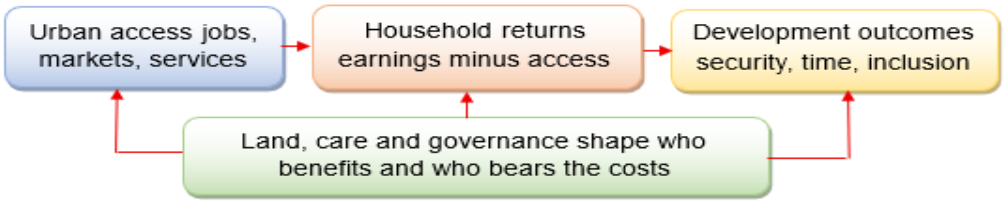


Figure 1: *Conceptual framework. Solid arrows indicate mechanisms; dashed arrows indicate institutional conditions. Author's design.*

Literature Review:

Lewis (1954) explains development through capital accumulation and the transfer of labour towards a modern sector. It's useful starting point is productivity reallocation. Its limitation for this study is the temptation to equate a sectoral move with welfare improvement. A worker can leave farming without gaining stable hours, bargaining power or a better living environment.

Harris and Todaro (1970) makes employment probability central to migration decisions. Expected rather than advertised earnings determine the attraction of urban work. Extending that logic, the present article treats commuting and paid care as costs of participation. It retains the expected-income insight without adopting the original model's full labour-market structure or its policy prescriptions.

Economic geography emphasizes gains from concentration and access to larger markets. The World Bank (2009) distinguishes spatially uneven production from inclusive living standards. That distinction supports investment in connections and services; it does not imply that every road automatically generates a local growth center.

Indian evidence provides a useful corrective. Asher and Novosad (2020) find that rural roads facilitate movement out of agriculture but do not produce major changes in income or assets over the period studied. Their identification strategy supports a causal interpretation in its study setting, not direct extrapolation to all Karnataka settlements. The lesson for this design is to measure labour reallocation and household welfare separately.

Table 2: Comparative literature and the proposed contribution

Source	Mechanism	Analytical Gap	Study Response
Lewis (1954)	Labour reallocation	Job quality not guaranteed	Track security and resources
Harris-Todaro (1970)	Expected earnings	Access costs need extension	Deduct mobility and care
Work Bank (2009)	Agglomeration and integration	Benefits can be uneven	Compare settlement groups
Asher-Novosad (2020)	Roads and occupational change	Context-specific effects	Avoid assuming income gains
UN-Habitat (2019)	Territorial coordination	Implementation needs evidence	Link household and local data

Source/status: *Author synthesis of the cited publications.*

Interpretation: *The study joins household opportunity costs to territorial governance; it does not claim that either literature alone predicts Karnataka's outcomes.*

Sustainability requires a further change of scale. Ostrom (2009) directs attention to interactions among resource systems, users and governance. United Nations Human Settlements Programme

(2019) advocates coordination across the rural–urban continuum. Together they motivate measuring pressures that do not follow municipal borders. Our contribution is an operational linkage between that territorial perspective and household accounting, rather than a new universal theory of urbanization.

The unresolved tension concerns the unit of success. Our framework distinguishes firm productivity, household security and territorial sustainability: a productivity gain may coincide with rising household access costs or ecological deterioration. A single transformation index can conceal these conflicts.

Research Hypotheses:

H1: Better urban access is associated with a higher non-farm employment share, but not necessarily higher net resources.

H2: Reliable transport and care services strengthen the association between access and net resources.

H3: Effects differ by gender, tenancy and baseline assets.

H4: Coordination is associated with better environmental service outcomes, conditional on density and local resources. These remain untested hypotheses.

Research Methodology:

1. Sequential explanatory mixed-method design:

The proposed primary study begins with household surveys and settlement audits, followed by interviews explaining contrasting outcomes. Four study areas would be selected purposively; eight settlements per area would be stratified by travel time and settlement status. Fifteen randomly listed households per settlement yield 480 baseline households. This allocation enables within-site comparisons but does not justify statewide prevalence estimates.

Table 3: Proposed fieldwork allocation; no collection completed

Study area	Settlements	Households	Follow-up interviews
Bengaluru outer region	8	120	8
Mysuru region	8	120	8
Dharwad region	8	120	8
Kalaburagi region	8	120	8
Total	**32**	**480**	**32**

Source/status*: Author's sampling proposal. Interviews are a purposive subsample of surveyed households; eight additional group discussions are planned.*

Interpretation: *Equal allocation supports comparison, not population proportionality. Final power must be assessed after pilot estimates of clustering and variation.*

Sampling lists would include tenants, informal workers and households with absent migrants. Random selection within listed strata would replace convenience recruitment. At least three contact attempts at different times would precede recording non-response; neighbors would not automatically substitute for unavailable respondents. Inclusion probabilities and reasons for non-response would be retained.

Two survey rounds, approximately twelve months apart in the same season, would measure changes in employment and costs. A short intervening telephone diary would help identify seasonal variation. The principal household respondent would report shared expenditure, while available adult members would report their own work and time use. Household totals alone cannot identify who controls income.

The pilot would test whether respondents distinguish gross business receipts from profit and regular employment from occasional shifts. Interviewers would use recent payment records

where voluntarily available, never make documentation a participation requirement. Settlement audits would record actual bus frequency and service interruptions rather than infrastructure presence alone. Repeat checks on a subsample would assess consistency without exposing respondents' answers to local gatekeepers.

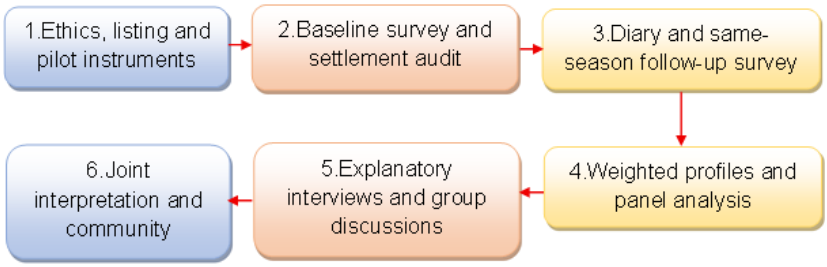


Figure 2: *Proposed fieldwork sequence. Each numbered stage has a distinct data-quality purpose; none is presented as completed.*

2. Ethics and qualitative integration:

Institutional ethics review would precede recruitment. Consent would cover voluntary participation, separate permission for recording, withdrawal and restricted data use. Kannada instruments would be piloted, with other locally appropriate languages offered where needed. Names and contact details would be stored separately from responses. Published extracts would suppress identifying combinations of place, occupation and tenure. Contrasting interview cases would be selected after quantitative analysis; disagreements between narratives and measures would be reported, not edited away.

Data Sources and Analysis Framework:

The evidence architecture separates published context, proposed observation and analytical illustration. Census-based population counts establish historical settlement change. The Periodic Labour Force Survey offers definitions and state-level employment context, not observations for the proposed villages (National Statistical Office, 2024). Administrative records would be requested locally and checked for coverage before use. No unobserved district indicator would be filled with a state average.

Table 4: Data sources, uses and evidentiary boundaries

Source	Coverage	Purpose	Boundary
Urban statistics handbook	Census 2001/2011	Population baseline	Historical, not current
PLFS 2023-24 report	Published labour statistics	Definitions and context	Not village estimates
Household panel	Proposed 480 households	Work, costs, welfare	Collection pending
Settlement audit	Proposed 32 settlements	Transport, water, waste	Verify service quality
Interviews/groups	Proposed 32/8	Explain mechanisms	No fabricated quotations
Scenario accounting	Author assumptions	Show thresholds	Not empirical estimates

Source/status: *Ministry of Housing and Urban Affairs (2019); National Statistical Office (2024); proposed research instruments.*

Interpretation*: Different sources answer different questions. The scenario exercise cannot substitute for household data or environmental measurement.*

The primary monetary outcome would be monthly household resources after necessary work-access expenses, expressed per adult equivalent and in common survey-period prices. Earnings, net self-employment receipts, farm income and transfers would be recorded separately. Travel, work-induced care and incremental housing expenses would then be deducted without double-counting business costs.

Consumption, debt stress and hours of unpaid work would remain distinct outcomes.

Table 5: Operational variables for the proposed survey

Dimension	Measure and unit	Reason for inclusion
Economic resources	Monthly net resources; INR	Income after participation costs
Employment quality	Paid days; contract; payment delays	Distinguishes jobs from security
Urban access	Door-to-job time; minutes	Includes waiting and connections
Care and mobility	Paid costs; unpaid hours by sex	Captures unequal participation burdens
Housing and tenure	Rent; occupancy security; displacement	Separates tenant and owner effects
Water and waste	Supply interruptions; collections coverage	Measures service outcomes directly
Land and ecology	Documented conversion; local water trend	Tracks costs beyond household cash

Source/status: *Author-designed measurement framework; units would be fixed before fieldwork.*

Interpretation: *A higher cash balance is insufficient if it is accompanied by worsening time poverty, insecure housing or ecological deterioration.*

Environmental indicators would be reported as a dashboard rather than collapsed into an arbitrary monetary index. Water availability, waste management and land conversion operate on different scales; a favorable average can hide a critical failure. Predefined thresholds would therefore accompany mean values, with transparent denominators and missing-data rates.

Missing income would not be coded as zero. The analysis plan would distinguish a true absence of earnings from refusal, uncertainty and an absent household member. Attrition would be compared across baseline income, tenure and access groups, with weighting and sensitivity checks reported separately. Location histories would preserve the original settlement identifier when a household moves, allowing changes in residence to be analyzed rather than silently removing mobile households from the panel.

1. Economic model and estimation strategy:

For analytical clarity, consider one earner choosing a livelihood pathway k. Expected monthly disposable resources are

$$N_k = p_k W_k - C_k - F_k - R_k, (1)$$

where W_k is earnings at full employment, p_k the expected fraction of paid work available, C_k transport expense, F_k paid care, and R_k incremental housing cost. All monetary inputs share one price basis. Other income and unpaid time are held constant only in this illustration; the proposed survey would measure them.

Table 6: Pre-specified empirical analysis; estimates remain pending

Questions	Analysis	Main caution
Who gains access?	Weighted settlement profiles	Site selections is purposive
Do resources improve	Household fixed-effects panel	Changing confounders remain
Who bears costs?	Gender/tenure interactions	Predefine limited comparisons
Why do outcomes differ?	Interview-survey joint display	Narratives do not establish causality

Source/status: *Author's proposed analysis plan.*

Interpretation: *Panel comparisons improve description of change; they do not automatically identify a causal effect of urban access.*

The planned equation is $N_{it} = \alpha_i + \lambda_t + \beta Ait + \gamma' X_{it} + \in_{it}$, where A measures access and X records time varying covariates. Errors would be clustered by settlement, with small-cluster checks. Household effects remove fixed heterogeneity, not reverse causality. Causal evaluation would require a defensible external source of service variation and, for difference-in-differences, additional pre-intervention observations.

Table 7: Assumed inputs for a reproducible accounting illustration

Input	Local livelihood	Access only	Coordinated services
Full-employment earnings W (INR)	12,000	18,000	18,000
Paid-work fraction p	0.95	0.80	0.90
Transport C (INR/month)	800	2,800	1,800
Paid care F (INR/month)	600	1,400	1,000
Incremental housing R (INR/month)	0	0	0

Source/status: *Author-selected values, not Karnataka wage or cost estimates.*

Interpretation: *Identical urban earnings isolate the assumed roles of job continuity, transport and care. Housing costs are varied later.*

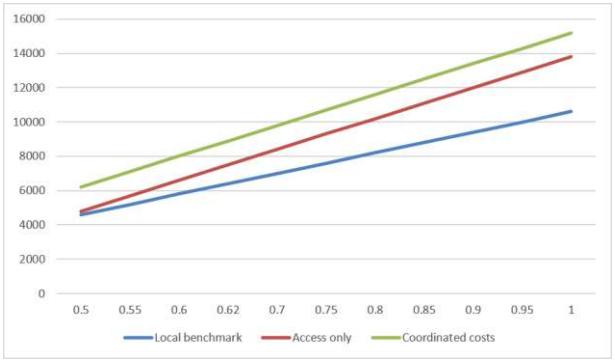


Figure 3: *Economic model: participation costs shift the earnings threshold. Lines follow equation (1); they are not fitted data.*

1. Analytical results, not field estimates:

Substitution into equation (1) gives the outcomes in Table 8. Expected gross earnings rise from INR 11,400 locally to INR 14,400 under access alone, an increase of 26.3 percent. Yet disposable resources rise by only INR 200, or two percent. The difference is absorbed by the assumed transport and care expenses. An occupational transition could therefore look substantial while producing little additional capacity to save or withstand a shock.

Results and Discussion:

Table 8: Calculated outcomes under the stated assumptions

Outcome	Local livelihood	Access only	Coordinated services
Expected gross PW (INR/month)	11400	14400	16200
Access costs C+F+R (INR/month)	1400	4200	2800
Net resources N (INR/month)	10000	10200	13400
Change from local benchmark	-	+2.0%	+34.0%

Source/status: *Author calculations from Table 7 and equation (1).*

Interpretation: *The coordinated pathway's advantage is conditional on its assumed inputs. These percentages are not estimated programme impacts or predictions for Karnataka.*

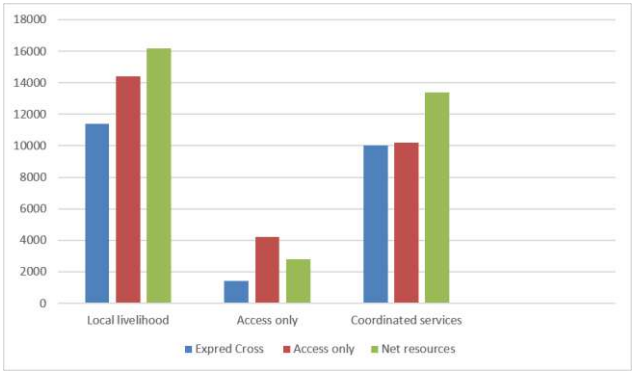


Figure 4: *Accounting analysis: the gap between earnings and disposable resources. All bars reproduce Table 8; no survey observations are represented.*

The INR 3,200 advantage of coordinated services over access alone decomposes exactly into INR 1,800 from a higher paid-work fraction, INR 1,000 from lower transport costs and INR 400 from lower paid care. This decomposition is arithmetic, not an empirical allocation of causal contributions. The cost assumptions favor coordination by construction; testing them is the purpose of the proposed field study.

Nevertheless, the comparison identifies what a useful survey must observe. Measuring gross pay without payment regularity misses one channel; omitting care misses another. Municipal infrastructure counts alone cannot reveal either. The exercise thus offers a measurement argument, not proof that the illustrated package is cost-effective or environmentally sustainable.

The constant-cost assumption also matters. Transport and care inputs represent expected monthly expenses held fixed when the paid-work fraction changes. Actual households may reduce travel on days without work, or continue paying for a travel pass and a care place. The survey would distinguish fixed commitments from expenses that vary with attendance. Estimating these relationships could flatten or steepen the illustrated net-resource curves, changing both the threshold and the implied vulnerability to interrupted employment.

2. Sensitivity, distribution and ecological boundaries:

Holding earnings at INR 18,000, the access-only pathway requires $p > (10{,}000+4{,}200)/18{,}000 = 0.789$ to exceed the local benchmark. Lower coordinated costs reduce that threshold to 0.711. Housing pressure can remove the advantage: an extra INR 3,500 per month reduces the coordinated example below the local benchmark even if its assumed employment reliability remains unchanged.

Table 9: One-at-a-time sensitivity of the coordinated pathway

Change from coordinated bases case	Net INR/Month	Versus Local
None : Table 7 assumptions	13,400	+34%
Paid-work fraction falls to 0.75	10,700	+7%
Paid-work fraction falls to 0.70	9,800	-2%
Housing expense rises by INR 2,000	11,400	+14%
Housing expense rises by INR 3,500	9,900	-1%
Transport expense rises by INR 1,000	12,400	+24%

Source/status: *Deterministic calculations, changing only the named input.*

Interpretation: *No confidence intervals are appropriate. Employment reliability and housing costs can reverse the comparison; the base-case ranking is not a robust empirical finding.*

Distributional analysis must distinguish renters from landowners and commuters from permanent migrants. A land-price increase may enrich an owner while increasing a tenant's housing burden. A bus connection may widen a worker's feasible job choices but remain unusable when

schedules conflict with care. These are mechanisms to investigate, not subgroup effects already measured in Karnataka.

Nor does a larger cash surplus establish environmental improvement. The coordinated case contains no measured water extraction, emissions or land-use change. Its ecological ranking is consequently undetermined. Additional earnings cannot simply be used to cancel a breached environmental threshold. The proposed dashboard would assess whether development shifts waste, flood exposure or resource depletion towards households whose income accounts appear unaffected.

Findings:

Three findings have different evidentiary status. First, the historical population evidence establishes simultaneous rural and urban growth, not a completed transition out of rural livelihoods. Second, the model demonstrates that employment access and disposable resources can move very differently. Third, sensitivity calculations show that job continuity and housing expense can overturn an apparently favorable pathway. Only the first is an observed Karnataka result; the other two follow from explicit assumptions.

The substantive implication is a distinction between *access* and *usable opportunity*. A household benefits when it can convert proximity into reliable earnings while retaining time, secure shelter and essential services. Fieldwork should test that conversion process rather than merely correlate distance with income.

A null average association would remain informative if gains among well-connected owners coexist with losses among renters or care-constrained workers.

Interview selection would therefore include both successful transitions and cases where households reject an apparently better-paid job. Such refusal need not imply resistance to change; it may reveal costs omitted from the questionnaire. Conversely, reported satisfaction would be checked against debt, working hours and service conditions. The aim is not to privilege either narratives or accounts, but to identify where they describe different dimensions of the same transition.

Policy Implications:

The framework suggests a coordinated policy agenda, not a demonstrated ranking of programmes. Karnataka's study areas should be evaluated as linked labour and service regions. A proposed inter-local compact could bring panchayats, urban local bodies and service providers together around shared transport routes, water systems and waste responsibilities. Such arrangements accord with territorial coordination principles, but their local effectiveness requires evaluation (United Nations Human Settlements Programme, 2019).

Table 10: Proposed policy instruments and accountability measures

Instrument	Economic channel	Proposed lead actors	Measures of success
Reliable bus connections	Lower access costs	Transport providers; local bodies	Door-to-job time; missed shifts
Care-linked employment support	Reduce participation barriers	Care providers; employers	Paid work and unpaid hours
Secure rental access	Limit displacement costs	Local bodies; housing agencies	Rent burden; occupancy security
Shared water/waste compact	Address spillovers	Panchayats; urban bodies	Interruptions; verified treatment
Small-enterprise services	Strengthen local demand	Producer groups; training centres	Net receipts; job retention
Transparent regional finance	Align costs and benefits	District/local institutions	Published spending and coverage

Source/status: Author proposals, not descriptions of existing entitlements or proven effects.

Interpretation: Each intervention is tied to an observable outcome; project completion alone is not evidence of household benefit.

Mobility policy should first examine reliability, connections and affordability, not just road length. Public support for care could be coordinated with employment schedules, while training should be linked to verified vacancies or enterprise demand. These are complements: a credential has limited value when the worker cannot reach the workplace or sustain attendance.

Housing policy deserves equal attention. Monitoring rents and occupancy security before a connectivity investment would help identify who might lose through higher location costs. Measures aimed at displacement should include tenants and informal occupants in consultation. Rising property values should not be treated as a universal welfare gain.

Environmental coordination requires clear responsibility for operation and maintenance. Water and waste projects should publish service outcomes for both receiving and supplying settlements. Financing discussions should identify downstream burdens and prevent improvements in one jurisdiction from being purchased through degradation in another. This follows a social–ecological approach rather than an assumption that urban expansion will finance its own repair (Ostrom, 2009).

Every package also carries a public cost. Household gains should be assessed alongside capital expenditure, maintenance, administrative capacity and alternative uses of funds. Pilot evaluation should report cost per sustained improvement in net resources, distribution across social groups and ecological compliance. A fiscally expensive package is not justified merely because its assumed household balance is favorable. Implementation should proceed through staged pilots with published eligibility rules and accessible grievance channels. Monitoring committees should include commuters, tenants and care providers alongside property owners and firms. Public reporting of service failures and corrective action would make coordination observable. Expansion should follow evidence of sustained benefits and feasible maintenance, rather than relying solely on a favorable first-year account or a completed construction target.

Conclusion:

Sustainable rural–urban transformation should expand livelihood choices without transferring their costs to less powerful households or neighboring ecosystems. The Karnataka baseline shows that urban growth and rural population growth can occur together. The original accounting framework then demonstrates why access to higher earnings need not produce an equivalent improvement in disposable resources. Reliable work, affordable mobility, care and secure housing determine whether an opportunity is usable. Ecological performance must be established separately. The proposed field study provides a route from these analytical propositions to evidence; it does not claim that this empirical step has already occurred.

Limitations and Future Research Scope:

The primary limitation is the absence of collected field data. Scenario inputs are assumptions, and the monetary model omits general-equilibrium wage responses, unpaid-time valuation and environmental damages. Historical census categories cannot describe current functional regions. The purposive selection of four areas limits external validity, while even a household panel would remain vulnerable to changing confounders and selective attrition.

Future work should pilot the instruments, assess statistical power, preregister outcomes and collect the proposed panel. Additional pre-intervention rounds could support stronger service evaluations where programme timing permits.

Household accounts should be linked to independently verified water, waste and land-use evidence. Subsequent studies could compare smaller towns, coastal settlements and remote areas outside the initial design. Consistent with the integrated ambitions of the Sustainable Development Goals, success should be judged across livelihoods, inclusion and ecology, not by urban population share alone (United Nations, 2015).

References:

1. Asher, S., & Novosad, P. (2020). Rural roads and local economic development. American Economic Review, 110 (3), 797–823. https://doi.org/10.1257/aer.20180268
2. Harris, J. R., & Todaro, M. P. (1970). Migration, unemployment and development: A two-sector analysis. American Economic Review, 60 (1), 126–142. https://www.aeaweb.org/aer/top20/60.1.126-142.pdf
3. Lewis, W. A. (1954). Economic development with unlimited supplies of labour. The Manchester School, 22 (2), 139–191. https://doi.org/10.1111/j.1467-9957.1954.tb00021.x
4. Ministry of Housing and Urban Affairs. (2019). Handbook of urban statistics 2019. Government of India. https://www.mohua.gov.in/pdf/5c80e2225a124Handbook%20of%20Urban%20Statistics%202019.pdf
5. National Statistical Office. (2024). Annual report, Periodic Labour Force Survey (PLFS), July 2023–June 2024.
6. Ministry of Statistics and Programme Implementation, Government of India. https://www.dge.gov.in/reference - publication-reports-annual
7. Ostrom, E. (2009). A general framework for analyzing sustainability of social-ecological systems. Science, 325 (5939), 419–422. https://doi.org/10.1126/science.1172133
8. United Nations. (2015). Transforming our world: The 2030 Agenda for Sustainable Development. https://sdgs.un.org/2030agenda
9. United Nations Human Settlements Programme. (2019). Urban–rural linkages: Guiding principles. Framework for action to advance integrated territorial development. https://unhabitat.org/urban-rural-linkages-guiding-princip les
10. World Bank. (2009). World development report 2009: Reshaping economic geography. https://doi.org/10.1596/978-0-8213-7607-2

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

An Analysis of the Education-Employment Paradox in India: A Quantitative Perspective

Dr. Kumar Y. Hanjagi
Assistant Professor, Department of Economics,
SKVP Arts, Science and Commerce College, Hole-Alur
Corresponding Author – Dr. Kumar Y. Hanjagi
DOI - 10.5281/zenodo.23058385

Abstract:

The increasing enrollment in higher education in India, coupled with rising levels of educated unemployment, presents a paradox that challenges the effectiveness of the country's education system in ensuring employability. This study explores the trends in higher education enrollment and employment gaps in India, analyzing data from various educational levels (undergraduate, postgraduate, and doctoral) and employment exchange registrations over the past five years. Despite significant growth in the number of educational institutions and graduates, the labor market remains unable to absorb the growing number of job seekers, especially among educated individuals. The study highlights the mismatch between academic qualifications and job market demands, with skill gaps, inadequate practical training, and regional disparities being key contributing factors. The research suggests several solutions, including curriculum reform, increased focus on skill development, improvement in the quality of education, and the creation of more job opportunities. This paper concludes that addressing the systemic gaps in both the education and employment sectors is critical to reducing educated unemployment and ensuring that India's growing educated workforce is equipped to contribute effectively to the economy.

Keywords: Higher Education, Enrolment and Employment.

Introduction:

India, with the second-largest population in the world, boasts the largest education system globally, accommodating approximately 25 crore students in school education and nearly 4 crore students in higher education. These impressive numbers reflect the vast scale of the Indian education system. On the surface, it appears that India has made education affordable and accessible to its citizens, resulting in a highly qualified and self-reliant population. However, the reality is far from this optimistic view. Despite the significant expansion of education, India faces a critical challenge: a low return on investment in education. While students acquire degrees and qualifications, many struggle to secure suitable employment due to various systemic issues.

Unemployment in India spans all levels of qualification, from the labor class with minimal education to highly qualified individuals, including Ph.D. holders. No sector or profession is untouched by the specter of unemployment. The COVID-19 pandemic has further exacerbated this issue, significantly increasing unemployment rates. However, the pandemic is not the sole cause of this crisis; it has only highlighted and intensified the underlying structural problems within the education and employment systems.

Higher education is often regarded as a critical pathway to improved career opportunities, economic mobility, and social advancement. In India, a country with one of the largest youth populations in the world, the pursuit of higher education has grown exponentially in recent decades. With government initiatives, private sector

participation, and increased societal emphasis on formal education, millions of young Indians are obtaining degrees in fields ranging from engineering to liberal arts. However, this surge in educational attainment has not been matched by proportional growth in employment opportunities. The disconnect between higher education and employment outcomes has emerged as a pressing challenge. Despite significant investments in education, many graduates face difficulties finding jobs that align with their skills and qualifications, contributing to a growing pool of educated unemployed youth. This mismatch has profound implications not only for individual aspirations but also for the broader economy, including productivity, innovation, and social stability.

This study seeks to explore the employment gaps faced by higher education graduates in India. By examining statistical trends and analyzing key factors contributing to graduate unemployment, this analysis aims to uncover the root causes of the problem. Issues such as skill mismatches, the quality of education, regional disparities, and the changing nature of labor market demands will be explored in depth. Understanding these dynamics is essential for formulating policies and interventions to bridge the gap between education and employment in India.

Review of Literature:

The relationship between higher education and employment outcomes has been a subject of significant scholarly attention. In the context of India, where higher education has expanded rapidly in recent decades, the issue of graduate unemployment has emerged as a critical challenge. This review examines existing research on the subject, focusing on three key themes: skill mismatches, quality of education, and structural labor market challenges.

Several studies highlight the persistent mismatch between the skills impacted by higher education institutions and the demands of the labor market. According to **FICCI & NASSCOM (2017),** over 80% of Indian graduates are considered unemployable in key sectors due to a lack of practical skills and industry-specific knowledge.

Agarwal (2020) emphasizes the disconnect between theoretical curricula and the rapidly changing needs of industries, particularly in technology and service sectors. These studies suggest that the inability of universities to update and align their curricula with evolving industry requirements has significantly contributed to unemployment among graduates.

The quality of higher education in India has been another focal area in the literature. Institutions across the country show significant variations in teaching quality, infrastructure, and access to resources. According to **Tilak (2019),** many private colleges prioritize profit over academic rigor, leading to the production of degrees with limited market value. **Mehrotra and Parida (2022)** argue that the absence of adequate quality assurance mechanisms has exacerbated inequalities within the education system, leaving graduates from substandard institutions at a severe disadvantage in the job market.

Tripathi (2021) discusses the oversupply of graduates in specific fields such as engineering and management, leading to increased competition for limited positions. At the same time, the rise of informal employment and gig economy opportunities has failed to absorb the educated workforce adequately. The literature also explores structural challenges in India's labor market that contribute to graduate unemployment. **Bhandari (2020)** notes, graduates from rural or semi-urban areas often face additional barriers to employment due to lack of access to urban job markets and professional networks.

Studies also highlight the role of socio-economic and demographic factors in shaping employment outcomes. Research by **Narayanan (2018)** underscores how caste, gender, and family income influence access to quality education and employment opportunities. Women, in particular, face greater challenges due to societal norms and

discriminatory hiring practices, leading to lower labor force participation rates despite higher educational attainment.

Deshpande (2022) the impact of globalization and technological advancements on employment opportunities has been another critical area of investigation. Automation and digital transformation have reduced demand for routine jobs, while creating opportunities in specialized fields requiring advanced technical skills. However, graduates from non-technical backgrounds are often ill-equipped to take advantage of these opportunities, further widening the employment gap.

Objectives of the Study:

1. Examine the extent and nature of unemployment among higher education graduates in India.
2. Suggest actionable policy recommendations to bridge the gap between education and employment, ensuring better career outcomes for Indian graduates.

Research Methodology:

The Study is based on Secondary data collected from various sources like Higher Education Profile (2018-19 and 2019-20), a report on higher education by Ministry of Education Government of India etc, UGC Annual Report-2019-20. The Statistical tools used like percentage.

Result and Discussion:

The Table 1 shows that the distribution of colleges in India based on their enrolment size for the academic year 2021-22 highlights significant disparities in student intake across institutions. A substantial proportion of colleges, approximately 29.6%, fall within the enrolment range of 200-500 students, indicating that smaller institutions dominate the higher education landscape in India. This is followed by colleges with enrolments ranging from 100 to 200 students, accounting for 17.9%, and those with 500-1000 students, comprising 16.5% of the total.

Interestingly, a significant number of colleges operate with very low enrolment numbers; 9.2% of colleges have fewer than 50 students, while 8.1% have enrolments between 50 and 100. These figures suggest that nearly one-fifth of colleges in India are underutilized, reflecting inefficiencies in resource allocation and the potential for improvement in institutional management. On the other hand, colleges with higher enrolment figures are relatively few. Institutions with 1000-2000 students constitute only 10.4% of the total, while those enrolling more than 3000 students make up just 4.5%. Similarly, colleges with enrolments between 2000-3000 represent a mere 3.8%. These smaller percentages indicate that large-scale colleges capable of catering to a broader student base are less common in India's higher education system.

Table 1: Cumulative Number of College in Different Range of Enrolment in India 2021-22

College Enrolment	Number of Colleges	% Distribution
0-50	3956	9.20
50-100	3478	8.10
100-200	7650	17.90
200-500	12674	29.60
500-1000	7062	16.50
1000-2000	4456	10.40
2000-3000	1622	3.80
>3000	1927	4.50

Source: Ministry of Education Government of India

The trends in higher educational institutions in India from 2015-16 to 2019-20 reveal steady growth, particularly in the number of universities and colleges, underscoring the expansion of the higher education system in the country. Over this five-year period, the number of universities increased significantly, from 799 in 2015-16 to 1,043 in 2019-20, marking a growth of approximately 30.5%. This consistent rise reflects the government's efforts to enhance access to higher education by establishing more universities across the country. Similarly, the number of colleges showed an upward trend, increasing from 39,071 in 2015-16 to 42,343 in 2019-20. While the growth was not linear—showing slight fluctuations, such as a dip in 2017-18—the overall increase of 8.4% suggests a broader effort to cater to the growing demand for higher education. Colleges, being the primary providers of undergraduate education, remain the backbone of the higher education system.

In contrast, the number of standalone institutions (such as polytechnics, teacher training institutes, and nursing schools) exhibited a more inconsistent trend. Starting at 11,923 in 2015-16, the number declined to 10,011 in 2017-18 before recovering to 11,779 in 2019-20. This fluctuation may indicate challenges in sustaining smaller, specialized institutions, possibly due to regulatory changes, resource constraints, or shifting student preferences toward multi-disciplinary universities and colleges. The total number of higher educational institutions grew from 51,793 in 2015-16 to 55,165 in 2019-20, reflecting a moderate 6.5% growth over five years. This growth, while commendable, highlights the need for a strategic focus on quality alongside quantity. The fluctuations in standalone institutions and the slower growth of colleges compared to universities suggest a need for balanced expansion, improved governance, and resource optimization to ensure equitable access and better outcomes in India's higher education sector.

Table 2: Trends of Higher Educational Institutions in India

Educational institutions	2015-16	2016-17	2017-18	2018-19	2019-20
No. of Universities	799	864	903	993	1043
No. of Colleges	39071	40026	39050	39931	42343
No of Standalone Institutions	11923	11669	10,011	10725	11779
Total	51793	52559	49964	51649	55165

Source: Ministry of Education Government of India

The table 3 provided the distribution of students' enrollment across different levels of higher education in India from 2015-16 to 2019-20 highlights a steady concentration of students at the undergraduate (UG) level, with minimal changes in the proportions of students at the postgraduate (PG) and doctoral (Ph.D.) levels. Over the five-year period, the percentage of students enrolled in undergraduate programs remained consistently high, ranging from 87.15% in 2015-16 to 87.63% in 2018-19, with a slight decrease to 87.16% in 2019-20. This indicates that the majority of students pursuing higher education in India are at the undergraduate level, reflecting the vast demand for undergraduate programs across various disciplines.

The proportion of students at the postgraduate level showed relatively minor fluctuations, hovering between 12.26% and 12.45% over the years. The slight dip in 2018-19 (11.88%) and the recovery in 2019-20 (12.26%) suggest that the number of students progressing to postgraduate education is relatively stable, but not growing at the

same pace as undergraduate enrollment. The percentage of students pursuing doctoral studies (Ph.D.) remained quite low throughout the period, ranging from 0.40% in 2015-16 to 0.58% in 2019-20, with a gradual increase observed over time. Although the growth is modest, it highlights a small but steady rise in the number of students pursuing advanced research and academic careers.

Table 3: Distribution of Level wise Students' Enrollment in Higher Education (In %)

Year	Ph.D.	PG level	UG Level
2015-16	0.40	12.45	87.15
2016-17	0.43	12.33	87.23
2017-18	0.48	12.36	87.16
2018-19	0.50	11.88	87.63
2019-20	0.58	12.26	87.16
Total	0.48	12.25	87.27

Source: Ministry of Education Government of India

The data from Table 4 reveals a concerning trend in the relationship between higher education enrollment and registered job seekers in employment exchanges from 2016 to 2020. The enrollment figures for both postgraduate (PG) and undergraduate (UG) levels are presented alongside the total number of job seekers registered with employment exchanges during this period.

At the postgraduate level, the number of enrolled students shows a gradual decline over the years. From 1,642 thousand in 2016, enrollment decreased to 1,263 thousand in 2020, indicating a decrease in the number of students pursuing postgraduate education. This decline is a notable shift, considering the growing emphasis on higher qualifications in the job market. In contrast, enrollment at the undergraduate level remained relatively stable, with slight fluctuations from 6,273 thousand in 2016 to 6,026 thousand in 2020. While the total number of undergraduate enrollments has remained large, the slight drop in 2018 (5,242 thousand) might reflect changing trends in student choices or regional variations in higher education access.

The total number of job seekers registered with employment exchanges also remained relatively high, consistently exceeding 4 lakh candidates each year, with a small increase from 4.33 lakh in 2016 to 4.28 lakh in 2020. Despite the continued growth in the number of students enrolled in higher education, the persistent registration of large numbers of job seekers indicates a significant gap between education and employment. This gap suggests that higher education in India is not translating into commensurate employment opportunities, reflecting deeper issues such as skill mismatches, the quality of education, and a saturated job market.

Table 4: Registered Candidates in Employment Exchange during 2016-2020 Enrollment in Higher Education in India

Year	PG level (in thousands)	UG Level (in thousands)	Total Job Seekers in Employment Exchange (In Lakh)
2016	1642	6273	433.8
2017	1533	6155	424.4
2018	1413	5242	421.2
2019	1485	6025	424.1
2020	1263	6026	428.3

Source: Ministry of Education Government of India

The data presented in Table 5 reflects the trend of educated unemployment in India over a five-year period, from 2016 to 2020. The number of registered unemployed candidates who possess education shows a significant decrease from 59.6 lakh in 2016 to 20.7 lakh in 2020. This decline suggests some improvement in the overall employment situation or a reduction in the number of individuals registering for employment. However, the number remains substantial, indicating that a large portion of the educated population continues to struggle with unemployment.

The placement figures, which represent the number of unemployed individuals who were successfully placed in jobs, have remained relatively low throughout this period, fluctuating between 3.1 lakh and 4.2 lakh annually. The total number of placements over five years amounts to just 19.1 lakh, which is a small proportion of the total registered unemployed (192.6 lakh). This low placement rate indicates that the employment opportunities available are insufficient to absorb the growing number of educated job seekers. The number of individuals who remained unemployed, despite being registered with employment exchanges, constitutes the largest category each year. In 2016, 55.5 lakh individuals remained unemployed, which decreased to 17.6 lakh in 2020. Despite the drop in the absolute number of remaining unemployed candidates, this figure still highlights the significant challenge of addressing educated unemployment in India.

Table 5: Year Wise No. of Registered Educated Unemployed Candidates in India

Year	Registered Unemployed (In Lakhs)	Placement Provided (In Lakhs)	Remained Unemployed (In Lakhs)
2016	59.6	4.1	55.5
2017	39.5	4.2	35.3
2018	38.3	4	34.3
2019	34.5	3.7	30.8
2020	20.7	3.1	17.6
Total	192.6	19.1	173.5

Source: Ministry of Education Government of India

Conclusion and Suggestions:

The analysis of higher education enrollment and unemployment trends in India reveals a significant gap between educational qualifications and employment opportunities. Despite the growth of educational institutions and an increase in the number of graduates at various levels, the employment market remains unable to absorb the increasing number of job seekers. The data shows that the majority of students are enrolled at the undergraduate level, while postgraduate and doctoral enrollments remain relatively low. Meanwhile, the number of educated unemployed individuals remains substantial, highlighting disconnect between the skills acquired through education and those demanded by the labor market. Several factors contribute to this phenomenon, including skill mismatches, lack of practical training, quality disparities across educational institutions, and the limited capacity of the labor market to accommodate the growing number of graduates. The economic impact of the COVID-19 pandemic has further exacerbated unemployment, but it is not the root cause; the structural issues in

the education system and labor market existed long before the pandemic.

Suggestions:

1. Curriculum Reform and Skill Development: To bridge the gap between education and employment, educational institutions should revise curricula to ensure that students are equipped with both theoretical knowledge and practical skills that align with industry demands. There should be a stronger emphasis on vocational training, internships, and hands-on learning experiences across disciplines. Collaboration with industries and employers can help in designing programs that are more relevant to current job market needs.

2. Enhancing Quality of Education: There needs to be a concerted effort to improve the quality of higher education, particularly in smaller, underfunded institutions. The establishment of quality assurance frameworks, accreditation bodies, and standardized testing can help maintain high standards across the education sector. Additionally, faculty development programs and investment in infrastructure are essential to provide a better learning environment for students.

3. Focus on Postgraduate and Research Education: Encouraging greater enrollment in postgraduate and research programs is essential for creating a knowledge-driven workforce. Increased government funding and incentives for higher studies, along with research-oriented jobs, can help in narrowing the gap between undergraduate education and employment.

4. Creating Employment Opportunities: Government policies should focus on fostering job creation across various sectors by promoting entrepreneurship, innovation, and public-private partnerships. Special attention should be given to regions and sectors facing higher unemployment rates. Initiatives such as skill development centers, startup incubators, and increased funding for SMEs can help create new job opportunities for graduates.

5. Expanding Career Guidance and Support Services: Universities should offer comprehensive career counseling services, including job placement assistance, mentorship programs, and training in soft skills such as communication, problem-solving, and leadership. Such support can better prepare students for the demands of the job market.

References:

1. **Agarwal, P. (2020).** *Higher Education in India: The Need for Industry-Academia Collaboration*. Journal of Education and Work, 33(2), 123-135.
2. **Bhandari, L. (2020).** *Regional Disparities and Employment Challenges in India's Labor Market*. Economic and Political Weekly, 55(12), 45-53.
3. **Deshpande, S. (2022).** *Impact of Automation on Graduate Employment in India*. Indian Journal of Labour Economics, 65(4), 349-364.
4. **FICCI & NASSCOM. (2017).** *Future of Jobs in India: A 2022 Perspective*. FICCI Reports.
5. **Mehrotra, S., & Parida, J. K. (2022).** *Quality Assurance in Indian Higher Education: Challenges and Prospects*. International Journal of Educational Development, 40(3), 29-41.
6. **Narayanan, R. (2018).** *Caste, Gender, and Employment Outcomes among Indian Graduates*. Social Science Research Journal, 57(1), 14-28.
7. **Tilak, J. B. G. (2019).** *Private Higher Education in India: Growth, Quality, and Challenges*. Higher Education Quarterly, 73(2), 149-166.
8. **Tripathi, D. (2021).** *Overcrowding of Certain Sectors: Understanding Graduate Unemployment in India*. Indian Economic Review, 46(1), 67-83.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Contemporary Challenges and Emerging Trends in the Indian Economy

Dr. Anilkumar[1] & Dr. R. V. Hegadal[2]

[1]*Assistant Professor & HOD of Economics,*

SJMV BAJSS Arts and Commerce College for Women Ranebennur-581115

[2]*Principal & Professor of Commerce,*

SJMV BAJSS Arts and Commerce College for Women Ranebennur-581115

Corresponding Author – Dr. Anilkumar

DOI - 10.5281/zenodo.23058407

Abstract:

The Indian economy has undergone significant structural transformation in recent decades, moving from an agriculture-dominated economy towards a diversified economy increasingly driven by services, manufacturing, infrastructure, digital technology and domestic consumption. At the same time, India faces several contemporary challenges, including employment generation, low female labour-force participation, agricultural productivity, regional inequalities, inflation risks, fiscal pressures, climate change, urbanisation, technological disruption and global economic uncertainty. The Economic Survey 2025–26 estimates India's real GDP growth at 7.4 per cent in FY 2025–26, with domestic demand, services, manufacturing and capital formation providing important support. Services account for more than half of Gross Value Added, while agriculture remains important for employment and rural livelihoods.

This paper examines the major challenges and emerging trends shaping the Indian economy. It analyses economic growth, sectoral transformation, employment, inflation, agriculture, fiscal policy, digitalisation, external-sector developments, climate change and artificial intelligence. The paper argues that India's future economic performance will depend not only on maintaining high GDP growth but also on improving productivity, generating quality employment, expanding women's economic participation, strengthening human capital and ensuring environmentally sustainable and regionally balanced development.

Keywords: Indian Economy, Economic Growth, Employment, Digital Economy, Inflation, Agriculture, AI, Fiscal Policy, Sustainable Development, Structural Transformation.

Introduction:

India is one of the world's major emerging economies and has experienced substantial structural and institutional transformation. Economic reforms, expansion of infrastructure, financial inclusion, digitalisation, rising domestic consumption and growth of the services sector have strengthened the country's economic base.

The latest Economic Survey indicates that India's real GDP is estimated to grow by 7.4 per cent in FY 2025–26**,** according to the First Advance Estimates. Services remain a major source of growth, while manufacturing and construction have also strengthened. Agriculture continues to provide an important stabilising role despite productivity-related structural constraints.

However, headline GDP growth does not by itself capture all dimensions of economic development. India needs to address the challenge of converting economic growth into productive employment, higher household incomes, human-capital development, gender-inclusive participation and sustainable development**.**

The contemporary Indian economy therefore presents a combination of opportunities and challenges. Digital payments, artificial intelligence, renewable energy, startups, infrastructure development, formalisation and new

forms of employment represent important emerging trends. Simultaneously, climate risks, technological displacement, agricultural vulnerability, urban congestion and global trade uncertainty require appropriate policy responses.

Objectives of the Study:

The present study on **"**Contemporary Challenges and Emerging Trends in the Indian Economy" aims to examine the major economic developments, challenges, and emerging opportunities shaping the Indian economy in the present era. The specific major objectives of the study are:

1. To examine the recent growth performance of the Indian economy.
2. To analyse structural changes among agriculture, industry and services.
3. To identify major contemporary economic challenges.
4. To examine recent employment and labour-market trends.
5. To study the growth of digitalisation and financial inclusion.
6. To analyse emerging trends such as artificial intelligence, gig employment and green growth.
7. To examine fiscal, inflationary and external-sector challenges.
8. To suggest policy measures for inclusive and sustainable economic development.

Methodological Approach of the Study:

The study on "Contemporary Challenges and Emerging Trends in the Indian Economy" adopts a descriptive and analytical research approach. The study is primarily based on secondary data collected from reliable and authoritative sources such as the Government of India, Reserve Bank of India (RBI), Ministry of Statistics and Programme Implementation (MoSPI), NITI Aayog, Economic Survey, Union Budget documents, World Bank, IMF, and other published research reports and academic literature.

The study examines major economic indicators such as GDP growth, inflation, employment, poverty, public expenditure, fiscal deficit, foreign trade, investment, agricultural and industrial performance, and the growth of the services and digital economy. Recent trends are compared across different periods to understand the changing economic conditions and emerging patterns.

Both qualitative and quantitative methods are used for analysis. Statistical information is presented through tables, charts, graphs, percentages, and trend analysis wherever appropriate. The study also reviews relevant government policies and economic reforms to understand their implications for economic growth, employment, income distribution, and inclusive development.

The methodological approach therefore provides a comprehensive understanding of the current challenges, structural changes, emerging opportunities, and future directions of the Indian economy. The analysis is descriptive and analytical in nature. Tables, trend analysis and charts are used to examine major economic developments.

Contemporary Challenges and Emerging Trends in the Indian Economy:

The Indian economy is undergoing significant structural and technological transformation. While India has achieved substantial progress in economic growth, infrastructure development, digitalisation, financial inclusion, and expansion of the services sector, it continues to face challenges such as unemployment, inflation, income and regional inequalities, agricultural distress, skill gaps, fiscal pressures, and environmental sustainability.

At the same time, several emerging trends are reshaping the economy. These include the rapid expansion of the digital economy, fintech and digital payments, artificial intelligence and automation, start-up and entrepreneurial activity, renewable energy, e-commerce, manufacturing

initiatives, and increasing integration with the global economy. The growth of digital public infrastructure has also created new opportunities for financial inclusion and delivery of public services.

The study of these developments is important for understanding the changing nature of the Indian economy and for assessing how economic policies can promote inclusive, sustainable, employment-oriented, and technology-driven growth. It also highlights the need to balance economic expansion with social equity, environmental protection, and regional development.

1. Recent Growth Performance of the Indian Economy:

India's growth performance remains relatively strong despite uncertainty in the global economy. The Economic Survey 2025–26 estimates real GDP growth at **7.4 per cent in FY 2025–26**. Services are estimated to grow by **9.1 per cent**, while manufacturing and construction are estimated to grow by around **7 per cent**. Agriculture and allied activities are estimated to grow by **3.1 per cent**.

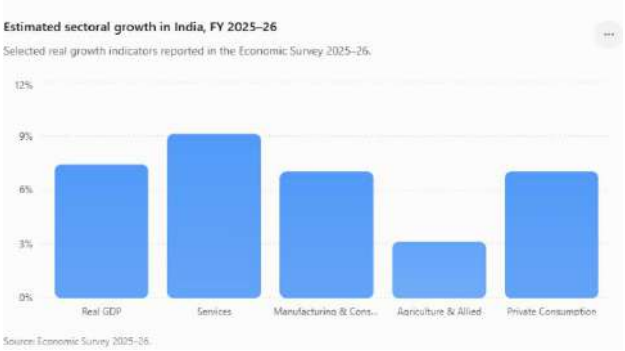
Table 1: Selected Growth Indicators, FY 2025–26

Sector/Indicator	Estimated Growth (%)
Real GDP	7.4
Services	9.1
Manufacturing & Construction	7.0
Agriculture & Allied Activities	3.1
Private Final Consumption Expenditure	7.0

Source: Economic Survey 2025–26.

The above table presents the estimated growth performance of major components of the Indian economy. Real GDP is estimated to grow by 7.4%, indicating a strong overall expansion of economic activity. The services sector records the highest growth at 9.1%, highlighting its continued importance as a major driver of India's economic growth.

Manufacturing and construction are estimated to grow by 7.0%, reflecting continued expansion in industrial and infrastructure-related activities. Private Final Consumption Expenditure (PFCE) also shows a growth rate of 7.0%, suggesting relatively strong domestic consumption demand.In comparison, agriculture and allied activities grow at 3.1%, considerably lower than the other sectors. This indicates that agricultural growth remains comparatively moderate and may continue to require attention through improvements in productivity, irrigation, technology, infrastructure, and farmer support.



Overall, the table indicates that India's growth is being driven predominantly by the services sector, supported by industrial activity and domestic consumption, while agriculture remains a relatively slower-growing component. This sectoral pattern highlights both the strength of India's diversified economy and the need for balanced development across agriculture, industry, and services.

2. Structural Transformation of the Indian Economy:

One of the most important trends in the Indian economy is the increasing contribution of services.The Economic Survey 2025–26 states that services contribute **more than half of India's Gross Value Added (GVA)** and have become an important driver of exports, employment and domestic economic activity. The services sector has also recorded average annual growth of

approximately 7–8 per cent over an extended period.

Major Structural Trends:

Agriculture:

- Remains essential for rural livelihoods and food security.
- Productivity growth remains a concern.
- Climate variability creates additional risks.
- Allied activities such as livestock and fisheries provide diversification.

Industry:

- Manufacturing and construction have strengthened.
- Infrastructure investment is supporting industrial capacity.
- MSMEs remain important for employment and entrepreneurship.

Services:

- IT and IT-enabled services continue to be important.
- Financial services, telecommunications, logistics, healthcare and education are expanding.
- Digitally deliverable services have increased India's participation in global markets.

3. Employment and Labour-Market Challenges:

Employment generation remains one of India's most important economic challenges. The issue is not simply the number of jobs but also their quality, productivity, stability, remuneration and social security**.**

According to PLFS-based 2025 data, the labour force participation rate for persons aged 15 years and above was 59.3 per cent**,** while the worker population ratio was 57.4 per cent and unemployment rate was3.1 per cent under usual-status measures. Female LFPR was 40.0 per cent compared with 79.1 per cent for males.

Table 2: Labour-Market Indicators, 2025

Indicator	Male (%)	Female (%)	Persons (%)
LFPR	79.1	40.0	59.3
WPR	76.6	38.8	57.4
Unemployment Rate	3.1	3.1	3.1

Source: PLFS 2025-based data.

The gender difference in labour-force participation remains substantial. In urban areas, female LFPR was **27.7 per cent**, compared with 76.2 per cent for males. The challenge therefore extends beyond reducing unemployment to increasing women's participation and expanding opportunities for productive, remunerative employment**.**Overall interpretation: **The figures indicate that the major gender difference is** not reflected in the unemployment rate but in participation and employment levels**.** Therefore, increasing women's participation in the labour force through skill development, employment opportunities, entrepreneurship, and supportive workplace conditions can be an important area of policy attention.



4. Youth Employment and Skill Development:

India's large working-age population provides an important demographic opportunity. However, the economic benefit of the demographic structure depends on the availability of:

- quality education;
- vocational training;
- digital skills;

- entrepreneurial opportunities;
- industry-relevant qualifications;
- apprenticeships; and
- formal employment.

The Economic Survey 2025–26 highlights the changing nature of work caused by digitalisation, green-energy transition and gig/platform employment. It also reports a **55 per cent increase in the number of gig workers between FY2021 and FY2025**. This creates opportunities for flexible employment but also raises questions regarding income security, social protection, occupational safety and long-term career development.

5. Agricultural Challenges:

Agriculture continues to play a critical role in India's economy because of its contribution to employment, food security and rural incomes.Agricultural and allied-sector growth is estimated at 3.1 per cent in FY2025–26**.** The Economic Survey notes that agricultural GVA growth in the first half of FY2025–26 was 3.6 per cent, but remained below the longer-term average of 4.5 per cent.

Major agricultural challenges:

1. Small and fragmented landholdings.
2. Low productivity in several crops.
3. Dependence on monsoon conditions.
4. Rising input costs.
5. Post-harvest losses.
6. Inadequate storage and processing facilities.
7. Market-price volatility.
8. Climate change.
9. Limited diversification in some regions.
10. Unequal access to technology and irrigation.

Emerging agricultural trends:

- Precision agriculture
- Digital agricultural markets
- Drones and remote sensing
- Micro-irrigation
- Food processing
- Farmer Producer Organisations
- Agri-fintech
- Climate-resilient agriculture
- Livestock and fisheries diversification

6. Inflation and Price Stability:

Inflation remains an important macroeconomic concern because it affects household purchasing power, savings, investment and the cost of living.

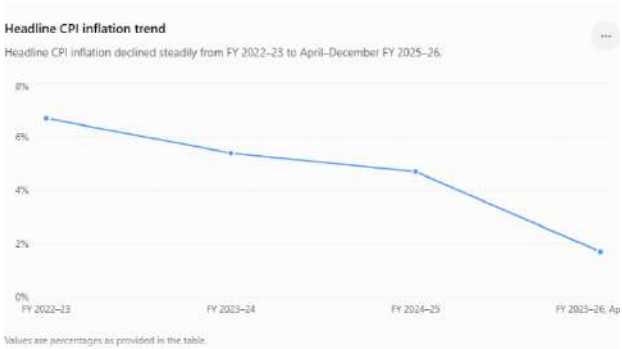
The Economic Survey 2025–26 reports a significant easing in headline CPI inflation. For April–December FY2025–26, headline CPI inflation was reported at **1.7 per cent**, compared with 4.7 per cent in FY2024–25. The Survey attributes much of the decline to lower food-price pressures and favourable supply conditions.

Table 3: CPI Inflation Trend

Period	Headline CPI Inflation (%)
FY 2022–23	6.7
FY 2023–24	5.4
FY 2024–25	4.7
FY 2025–26, Apr–Dec	1.7

Source: Economic Survey 2025–26; MoSPI.

The table indicates a clear moderation in headline CPI inflation in India over the period considered. Inflation declined from 6.7% in FY 2022–23 to 5.4% in FY 2023–24 and 4.7% in FY 2024–25, before falling to 1.7% during April–December of FY 2025–26. This trend reflects a significant moderation in the rate of increase in consumer prices. The lower inflation environment can support household purchasing power and macroeconomic stability, although the partial-year nature of the FY 2025–26 figure should be considered while making comparisons.



7. Fiscal Challenges:

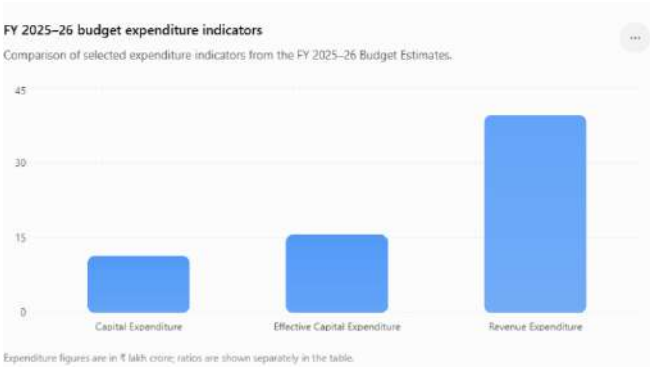
Fiscal policy plays an important role in supporting infrastructure, social development and macroeconomic stability.The Union Budget 2025–26 estimated the fiscal deficit **at** 4.4 per cent of GDP**,** compared with 4.8 per cent in the revised estimate for FY2024–25. Capital expenditure was budgeted **at** ₹11.21 lakh crore**,** equivalent to about 3.1 per cent of GDP. Effective capital expenditure, including grants for creation of capital assets, was estimated at ₹15.48 lakh crore, or 4.3 per cent of GDP.

Table 4: Selected Fiscal Indicators, FY2025–26

Indicator	FY2025–26 BE
Fiscal Deficit	4.4% of GDP
Capital Expenditure	₹11.21 lakh crore
Capital Expenditure/GDP	3.1%
Effective Capital Expenditure	₹15.48 lakh crore
Effective Capital Expenditure/GDP	4.3%
Revenue Expenditure	₹39.44 lakh crore

Source: Economic Survey 2025–26; MoSPI.

The above table found that the FY 2025–26 Budget Estimates indicate a fiscal strategy that combines deficit management with continued emphasis on public investment. The fiscal deficit is budgeted at 4.4% of GDP, while capital expenditure is estimated at ₹11.21 lakh crore, equivalent to 3.1% of GDP. Including grants for capital-asset creation, effective capital expenditure rises to ₹15.48 lakh crore or 4.3% of GDP. At the same time, revenue expenditure remains substantially larger at ₹39.44 lakh crore. Overall, the figures demonstrate the importance of balancing fiscal sustainability, government commitments and productive capital formation in India's economic policy.



8. Digitalisation and the Digital Economy:

Digitalisation has emerged as one of the major structural transformations in the Indian economy. The rapid expansion of digital infrastructure, smartphones, internet connectivity, digital payments, e-commerce, fintech, cloud computing and digital public services has changed the way households, businesses and government institutions undertake economic activities. India's digital economy is increasingly becoming an important source of productivity, financial inclusion, employment and innovation.

According to NPCI data, UPI processed 24,508.96 million transactions in August 2026**,** with transaction value of approximately ₹29.82 lakh crore.

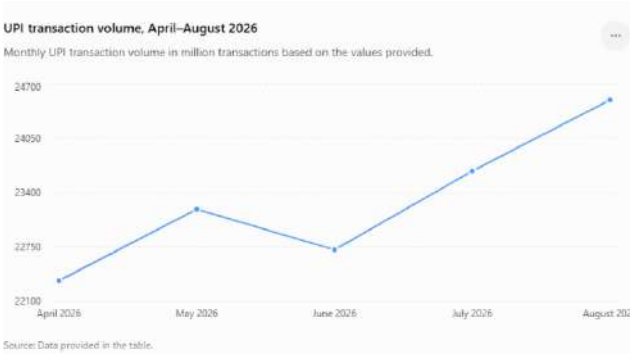
Table 5: UPI Transactions, Selected Recent Months

Month	UPI Volume (million)	Value (₹ crore)
April 2026	22,346.80	29,02,988.05
May 2026	23,201.93	29,90,424.21
June 2026	22,716.07	28,92,138.67
July 2026	23,658.35	29,87,880.49
August 2026	24,508.96	29,82,355.95

Source: NPCI.

The UPI data for April–August 2026 indicate sustained and expanding digital-payment activity in India. Transaction volume increased from 22,346.80 million in April to 24,508.96 million in August, representing approximately 9.7% growth during the period. Although transaction value fluctuated from month to month, it remained close

to ₹29 lakh crore each month. The continued high volume and value of transactions demonstrate the growing importance of digital payments as a component of India's digital economy, financial inclusion and formalisation of economic transactions. The data demonstrate the large scale and continuing importance of UPI in India's digital economy**.** Despite fluctuations in transaction value, transaction volume increased during the period. This suggests sustained use of digital payments by consumers, businesses and other economic participants.



9. Artificial Intelligence and the Future of Work:

Artificial Intelligence (AI) is emerging as one of the most important technological forces influencing the future of the Indian economy. The rapid development of generative AI, machine learning, automation, robotics and data analytics is changing production processes, business models and the nature of employment. AI can improve productivity and create new economic opportunities, but it may also transform or reduce demand for some existing tasks and occupations. Therefore, the impact of AI on employment is likely to depend significantly on the pace of technological adoption, the nature of occupations and workers' ability to acquire new skills. Artificial Intelligence is likely to become an important determinant of productivity, competitiveness and employment patterns in the Indian economy. Its effect on the future of work will not be limited to the creation or elimination of jobs; it will also involve substantial changes in the tasks workers perform and the skills they require**.** The challenge for India is therefore to ensure that technological progress is accompanied by investment in human capital, digital infrastructure, reskilling and inclusive opportunities. A balanced approach can help the economy capture the productivity and innovation benefits of AI while reducing the risks associated with technological disruption.

10. Gig and Platform Economy:

The Gig and Platform Economy has emerged as an important component of India's changing labour market. It refers to a system in which individuals undertake short-term, flexible, task-based or project-based work, often through digital platforms. Workers may provide services such as transportation, food delivery, e-commerce delivery, household services, freelancing, online tutoring, digital marketing and other professional services.

Digital platforms such as ride-hailing, food-delivery, e-commerce and online freelance platforms have created new employment opportunities, particularly for young people, women, migrants and individuals seeking flexible working arrangements. At the same time, gig work raises concerns relating to income stability, social security, occupational safety, working conditions and access to employment benefits.

According to NITI Aayog's*India's Booming Gig and Platform Economy*, India's gig workforce was estimated at 7.7 million workers in 2020–21. The report projected that the gig workforce could increase to 23.5 million workers by 2029–30, indicating the potential significance of this sector in India's future employment structure.

11. Climate Change and Green Economy:

Climate change has become an important economic issue because it affects agriculture, water resources, infrastructure, health and livelihoods.India's economic strategy increasingly requires balancing growth with environmental sustainability.

Emerging green-economy trends:

1. Renewable energy expansion.
2. Electric mobility.

3. Green hydrogen.
4. Energy-efficient infrastructure.
5. Circular economy.
6. Waste management.
7. Climate-smart agriculture.
8. Green finance.
9. Carbon-market development.
10. Sustainable urban planning.

Climate change should increasingly be viewed not only as an environmental problem but also as a macroeconomic and development challenge**.**

12. External Sector and Global Economic Uncertainty:

India is increasingly integrated with the global economy through:

- merchandise exports;
- services exports;
- foreign direct investment;
- remittances;
- global value chains;
- international financial flows.

However, geopolitical tensions, trade restrictions, supply-chain disruptions, commodity-price volatility and global interest-rate changes can affect India's external sector.

The Economic Survey 2025–26 notes that global economic conditions remain uncertain because of geopolitical tensions, trade disruptions and divergent growth and inflation conditions across major economies.

India therefore needs to diversify export markets, strengthen domestic manufacturing capabilities and improve participation in global value chains.

13. Financial Inclusion:

Financial inclusion has expanded considerably through banking, digital payments and technology-enabled financial services.The RBI reported that India's Financial Inclusion Index increased to 64.2 in March 2024**,** representing a year-on-year increase of 6.8 per cent.

Major developments:

- Expansion of bank accounts.
- Digital payments.
- Mobile banking.
- Direct benefit transfers.
- Microfinance.
- Financial literacy.
- Digital lending.
- Increased formalisation of economic activity.

The remaining challenge is to ensure that financial inclusion translates into meaningful and responsible access to savings, insurance, credit and investment products**.**

Major Contemporary Challenges facing in Indian Economy:

The Indian economy has undergone substantial structural transformation in recent decades, supported by economic reforms, technological advancement, expansion of infrastructure, growth of services, increasing digitalisation and integration with the global economy. India has also recorded strong economic growth in recent years. The World Bank reports that the Indian economy grew by 7.6% in FY2025–26, while growth is projected to moderate to 6.6% in FY2026–27 amid external economic and energy-related risks. However, high economic growth does not automatically eliminate structural and developmental challenges. India continues to face issues relating to employment generation, inequality, agricultural productivity, inflation, human capital, regional disparities, infrastructure, environmental sustainability, fiscal management and technological transformation. The Economic Survey 2025–26 itself identifies employment and skill development, agriculture, infrastructure, climate change, education and health, urbanisation, AI and external-sector resilience among the major areas requiring continued policy attention.

Therefore, the contemporary Indian economy faces a dual challenge: maintaining high and stable economic growth while ensuring that growth is inclusive, employment-intensive, environmentally sustainable and regionally balanced.

1. Emerging Trends in the Indian Economy:

Employment generation remains one of the central challenges of India's development process. India has a large working-age population, creating both a demographic opportunity and a requirement for sustained job creation. According to the PLFS 2025, the unemployment rate for persons of all ages under usual status (PS+SS) was 2.3% in Karnataka, while the corresponding all-India data in the report provide state- and gender-specific estimates.

The challenge is not merely the unemployment rate. It also concerns the quality, productivity and stability of employment. A large part of employment remains informal, while young people increasingly require skills suited to manufacturing, modern services, digital technologies, artificial intelligence and emerging occupations.

Major employment-related challenges:

- Insufficient creation of formal and productive jobs.
- Skill mismatch between education and industry requirements.
- High dependence on informal employment.
- Youth employment and transition from education to work.
- Need for greater female participation in the labour market.
- Automation and artificial intelligence changing occupational structures.
- Expansion of gig and platform employment and associated social-security concerns.

The Economic Survey 2025–26 specifically includes employment and skill development and the implications of AI for the labour market among major areas of contemporary economic policy.

2. Poverty, Inequality and Inclusive Growth:

India has made significant progress in reducing poverty. The World Bank reports that extreme poverty declined substantially between 2011–12 and 2022–23, while poverty at the lower-middle-income-country line also declined considerably. Nevertheless, inequality in income, wealth, assets, education, healthcare and access to economic opportunities remains an important policy concern. Economic growth needs to translate into improved living standards across different social groups and geographical regions.

3. Agricultural Challenges:

Agriculture continues to play an important role in employment, rural livelihoods and food security. However, Indian agriculture faces structural constraints such as small and fragmented holdings, dependence on monsoon conditions, inadequate irrigation in some regions, post-harvest losses and market-related risks.

Climate variability has increased the importance of water management, crop diversification, agricultural technology and climate-resilient farming.

Key agricultural challenges:

- Low and uneven agricultural productivity.
- Fragmentation of landholdings.
- Dependence on rainfall.
- Rising input costs.
- Post-harvest losses.
- Inadequate storage and cold-chain infrastructure.
- Market-price volatility.
- Limited value addition and food processing.
- Climate-related production risks.

The Economic Survey 2025–26 identifies agricultural productivity, income security and food security as important areas for strengthening the rural economy.

4. Inflation and Price Stability:

Inflation directly affects household purchasing power, particularly for lower-income households that allocate a relatively large proportion of their expenditure to food and essential commodities.

Although the Economic Survey 2025–26 describes inflation as increasingly anchored, price pressures can still arise from food supply disruptions, energy prices, weather shocks, international commodity prices and geopolitical developments**.**

Major causes of inflationary pressure

- Food-supply disruptions.
- Weather and climate shocks.

- International crude-oil prices.
- Supply-chain disruptions.
- Exchange-rate movements.
- Global commodity-price changes.
- Demand-supply imbalances.

Maintaining price stability while supporting economic growth therefore remains an important macroeconomic policy challenge.

5. Human Capital: Education, Health and Skills:

Economic development increasingly depends on the quality of human capital. India has made progress in expanding access to education and healthcare, but significant differences remain in quality, affordability, infrastructure and outcomes. The World Bank identifies unequal access to quality health and education services as one of the continuing development challenges for India. Investment in human capital is essential for converting India's demographic potential into sustained economic productivity.

6. Regional Imbalances:

Economic development in India is geographically uneven. States and regions differ considerably in terms of income, industrialisation, infrastructure, human development, urbanisation and employment opportunities. The World Bank identifies regional disparities in development outcomes as one of India's continuing challenges.

Causes of regional disparities

- Unequal industrial development.
- Differences in infrastructure.
- Unequal human-capital development.
- Geographical conditions.
- Differences in investment flows.
- Variations in urbanisation.
- Differences in institutional capacity.

Balanced regional development requires improved connectivity, investment in human capital, industrial diversification and greater economic opportunities in relatively less-developed regions.

7. Infrastructure and Urbanisation:

Rapid urbanisation is creating increasing demand for housing, transport, water supply, sanitation, waste management, electricity and digital infrastructure**.**The challenge is particularly significant because urban growth needs to be supported by infrastructure that is both economically efficient and environmentally sustainable.

Major infrastructure challenges:

- Urban congestion.
- Public transport requirements.
- Affordable housing.
- Water and sanitation.
- Waste management.
- Logistics and connectivity.
- Reliable energy supply.
- Digital infrastructure.

The Economic Survey 2025–26 includes investment and infrastructure as well as urbanisation among important areas for strengthening India's future growth capacity.

8. Informal Sector and Social Security:

A major characteristic of India's labour market is the importance of informal employment. Informal workers often face greater uncertainty concerning income, employment continuity, occupational safety and social-security coverage. The expansion of the gig and platform economy has added a new dimension to this issue. Platform-based work creates income opportunities but also raises questions regarding social protection, insurance, worker safety and employment security. Consequently, India's policy challenge is to expand employment while progressively improving the formalisation and social protection of workers**.**

9. Climate Change and Environmental Sustainability:

Climate change has become an increasingly important economic challenge. Extreme heat, floods, droughts, irregular rainfall and other environmental events can affect agricultural production, infrastructure, health and household incomes.

The World Bank identifies increasing vulnerability to climate change and natural disasters among India's continuing development challenges.

Economic consequences:

Climate change → Agricultural losses → Income instability → Food-price pressure

Extreme weather → Infrastructure damage → higher public expenditure

Heat stress → Lower labour productivity → Reduced economic output

Therefore, India's growth strategy increasingly requires a balance between economic expansion and environmental sustainability.

10. Fiscal Challenges:

Fiscal policy has to balance three major objectives:

1. Financing development and infrastructure.
2. Providing social and economic support.
3. Maintaining long-term fiscal sustainability.

Public expenditure on infrastructure, education, health and social protection can support long-term growth. At the same time, fiscal management requires appropriate attention to revenue mobilisation, expenditure efficiency and debt sustainability.The Economic Survey 2025–26 identifiesfiscal developments and credible fiscal consolidation as a major component of India's macroeconomic policy framework.

11. External-Sector Challenges:

India's economy is increasingly integrated with the global economy. This provides opportunities through exports, foreign investment, technology transfer and international services trade, but it also exposes the economy to external shocks. The Economic Survey 2025–26 highlights the importance of external-sector resilience**,** while the World Bank notes that geopolitical developments and international commodity prices can affect India's growth outlook.

Major external risks:

- Global economic slowdown.
- Geopolitical conflicts.
- Crude-oil price volatility.
- Global supply-chain disruptions.
- Protectionism and trade restrictions.
- Exchange-rate volatility.
- Changes in international capital flows.

Policy Implications:

The contemporary challenges and emerging trends in the Indian economy have significant implications for economic policy. The objective of policy should not be limited to achieving higher economic growth, but should also focus on employment generation, social inclusion, productivity enhancement, technological advancement and environmental sustainability.

- **Employment-Centred Economic Growth:**
  - ❖ Economic policies should give greater emphasis to sectors capable of generating large-scale productive employment.
  - ❖ Manufacturing, MSMEs, tourism, construction, logistics, agro-processing and modern services can play an important role.
  - ❖ Employment generation should be considered an important indicator of the quality of economic growth.
- **Strengthening Human Capital:**
  - ❖ Greater public and private investment is required in education, healthcare, nutrition and skill development.
  - ❖ Higher education institutions should strengthen industry linkages and employability-oriented programmes.
  - ❖ Skill development policies need to respond to emerging areas such as Artificial Intelligence, data analytics, digital finance and advanced manufacturing.
- **Promoting Inclusive Growth:**
  - ❖ Economic growth should benefit different income groups, regions and occupational categories.
  - ❖ Social-protection programmes should continue to support vulnerable households.
  - ❖ Greater access to formal finance, education, healthcare and digital services can improve economic participation.
- **Agricultural and Rural Transformation:**

- Agricultural policy should move beyond production alone towards productivity, diversification and value addition.
- Investment in irrigation, storage, food processing, agricultural technology and rural infrastructure should be strengthened.
- Rural non-farm employment and entrepreneurship should be promoted to diversify sources of rural income.

- **Supporting MSMEs and Entrepreneurship:**
  - MSMEs require easier access to institutional credit, technology, skilled labour and domestic and international markets.
  - Simplification of regulatory procedures can encourage formalisation.
  - Entrepreneurship development can create employment and promote local economic activity.
- **Strengthening the Gig and Platform Economy:**
  - The expansion of platform-based employment requires appropriate mechanisms for social security and worker protection.
  - Gig workers should have improved access to accident insurance, healthcare, pension and other forms of social protection.
  - Platform practices relating to payments, incentives and working conditions should become more transparent.
- **Managing Inflation:**
  - Policy measures should address both demand-side and supply-side sources of inflation.
  - Better agricultural supply chains, storage facilities and logistics can reduce food-price volatility.
  - Coordination between monetary, fiscal and supply-side policies is important for maintaining price stability.
- **Promoting Digital and Technological Transformation:**
  - Digitalisation should be accompanied by wider access to affordable internet, digital literacy and digital financial services.
  - Public policy should encourage innovation while addressing cybersecurity, data protection and digital exclusion.
  - Artificial Intelligence should be used to improve productivity while supporting workers through reskilling and upskilling.
- **Improving Infrastructure:**
  - Continued investment in roads, railways, ports, energy, logistics, urban infrastructure and digital connectivity is essential.
  - Infrastructure development can reduce transaction costs and improve India's competitiveness.
  - Public-private partnerships can complement public investment where appropriate.
- **Addressing Regional Disparities:**
  - Development policies should give greater attention to relatively less-developed states, districts and rural areas.
  - Infrastructure, education, healthcare and investment should be expanded in regions with weaker economic opportunities.
  - Region-specific development strategies can make better use of local resources and skills.
- **Promoting Women's Economic Participation:**
  - Policies should facilitate women's participation in education, employment and entrepreneurship.
  - Access to credit, digital finance, skill development and markets should be strengthened.
  - Safe workplaces, transport and childcare facilities can help reduce barriers to women's participation in economic activities.

- **Climate-Resilient Development:**
  - ❖ Economic planning should integrate climate adaptation and environmental sustainability.
  - ❖ Renewable energy, energy efficiency, water conservation and sustainable agriculture should receive greater attention.
  - ❖ Climate-resilient infrastructure can reduce the economic impact of extreme weather events.
- **Maintaining Fiscal Sustainability:**
  - ❖ Public expenditure should prioritise productive investment in infrastructure, education, health and human capital.
  - ❖ Greater efficiency in government expenditure can improve the developmental impact of public resources.
  - ❖ Fiscal consolidation should be pursued alongside adequate investment in growth-enhancing sectors.
- **Strengthening External Economic Resilience:**
  - ❖ India should diversify its export products and markets.
  - ❖ Greater participation in global value chains can strengthen manufacturing and export capacity.
  - ❖ Policies should reduce vulnerability to international commodity-price fluctuations and global supply-chain disruptions.
- **Improving Governance and Policy Implementation:**
  - ❖ Evidence-based policymaking and effective monitoring are essential for achieving policy objectives.
  - ❖ Greater use of digital technologies can improve transparency and delivery of public services.
  - ❖ Coordination among the Union Government, State Governments, local institutions, private sector and civil society can improve implementation.

Concluding Remark:

The Indian economy is undergoing a complex process of structural transformation. Strong economic growth, expansion of services, infrastructure development, digitalisation, financial inclusion and entrepreneurship have created significant opportunities. The latest Economic Survey estimates real GDP growth at 7.4 per cent for FY2025–26, while services remain an important source of economic expansion. At the same time, India faces important challenges relating to employment quality, female labour-force participation, agricultural productivity, regional inequality, climate change, urbanisation and technological disruption.

The central challenge for the Indian economy is therefore to convert high economic growth into broad-based improvements in productivity, employment, income and living standards**.** India's emerging economic model will increasingly depend on the interaction between human capital, technology, infrastructure, entrepreneurship and sustainable development.

The future trajectory of the Indian economy will be influenced by its ability to combine economic efficiency with social inclusion and environmental sustainability**.** A development strategy based on productive employment, human-capital formation, technological innovation, agricultural transformation, women's economic participation and fiscal sustainability can provide a stronger foundation for India's long-term economic development.

References:

A. Books and Academic References:

1. Ahluwalia, I. J., & Little, I. M. D. *India's Economic Reforms and Development*. Oxford University Press, New Delhi.
2. Datt, R., &Sundharam, K. P. M. *Indian Economy*. S. Chand Publishing, New Delhi.

3. Misra, S. K., &Puri, V. K. *Indian Economy*. Himalaya Publishing House, Mumbai.
4. Ramesh Singh. *Indian Economy*. McGraw Hill Education, New Delhi.
5. Uma Kapila. *Indian Economy Since Independence*. Academic Foundation, New Delhi.
6. Jalan, B. *The Indian Economy: Problems and Prospects*. Penguin Books, New Delhi.

B. Government and Official Sources:

1. Government of India, Ministry of Finance. *Economic Survey 2025–26*. New Delhi: Department of Economic Affairs, 2026.
2. Government of India, Ministry of Finance. *Economic Survey 2024–25*. New Delhi: Department of Economic Affairs, 2025.
3. Government of India, Ministry of Finance. *Union Budget 2026–27*. New Delhi, 2026.
4. Reserve Bank of India (RBI). *Annual Report 2024–25*. Mumbai: Reserve Bank of India.
5. Reserve Bank of India (RBI). *Handbook of Statistics on Indian Economy*. Mumbai: RBI.
6. Reserve Bank of India (RBI). *Report on Trend and Progress of Banking in India 2024–25*. Mumbai: RBI.
7. Ministry of Statistics and Programme Implementation (MoSPI). *Periodic Labour Force Survey (PLFS) 2024–25*. Government of India, New Delhi.
8. Ministry of Statistics and Programme Implementation (MoSPI). *National Accounts Statistics 2025*. Government of India, New Delhi.
9. NITI Aayog. *India's Booming Gig and Platform Economy: Perspectives and Recommendations on the Future of Work*. Government of India, New Delhi, 2022.
10. NITI Aayog. *Strategy for New India @75*. Government of India, New Delhi.
11. Ministry of Agriculture and Farmers Welfare. *Agricultural Statistics at a Glance*. Government of India, New Delhi.
12. Ministry of Electronics and Information Technology (MeitY). *Annual Report 2024–25*. Government of India, New Delhi.
13. Ministry of Labour and Employment. *Annual Report 2024–25*. Government of India, New Delhi.
14. Ministry of Environment, Forest and Climate Change. *Annual Report 2024–25*. Government of India, New Delhi.

Important Websites / Data Sources:

1. Government of India – India Budget: indiabudget.gov.in
2. Reserve Bank of India: RBI
3. NITI Aayog: NITI Aayog
4. Ministry of Statistics and Programme Implementation: MoSPI
5. World Bank – India: World Bank India

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Indian Economy Transition: Contemporary Challenges, Emerging Issues and Future Prospects

Mr. Vinayak Madig
Assistant Professor, Department of Economics,
Smt. Kusumavati Miraji Arts and Commerce College, Bedkihal-Shamanewadi-591214
Corresponding Author – Mr. Vinayak Madig

DOI - 10.5281/zenodo.23058417

Abstract:

India's economic transition is characterized by sustained economic expansion alongside significant changes in sectoral composition, employment patterns, technological adoption and the nature of economic participation. The ***Economic Survey 2025–26*** *estimates India's real GDP growth at* ***7.4%*** *and real GVA growth at* ***7.3%*** *for FY 2025–26, with services contributing* ***51.1% of nominal GVA****, industry* ***24.3%****, and agriculture, livestock, forestry and fishing* ***15.2%****. Manufacturing is estimated to account for* ***12.8% of nominal GVA****, indicating the continuing importance of industrial transformation alongside the dominant role of services. However, the transition also presents substantial labour-market and inclusion challenges. According to* ***PLFS 2025****, the Worker Population Ratio (WPR) for persons aged 15 years and above was* ***57.4%****, comprising* ***76.6% for males and 38.8% for females****. The rural WPR stood at* ***61.2%****, compared with* ***49.7% in urban areas****, highlighting important spatial and gender dimensions of employment participation. Against this background, the present study examines India's economic transition through changes in sectoral performance, employment dynamics, rural–urban differences, gender dimensions and emerging economic trends. The study adopts a descriptive and analytical approach based on secondary data obtained from the* ***Economic Survey 2025–26, Periodic Labour Force Survey 2025, Ministry of Statistics and Programme Implementation, Reserve Bank of India, NITI Aayog and other authoritative sources****. The analysis highlights a simultaneous expansion of services and technology-enabled economic activities, continued transformation in manufacturing and infrastructure, and persistent challenges relating to employment, gender participation, skill development and inclusive growth. The study argues that the future trajectory of the Indian economy will depend not merely on maintaining high aggregate growth, but also on converting structural and technological transformation into productive employment, higher productivity, broader participation and sustainable development. The paper therefore presents India's economic transition as a multidimensional process in which growth, structural transformation, employment, technological change, inclusion and sustainability need to be considered together.*

Keywords: Economic Transition; Structural Transformation; Digital Economy; Inclusive Growth; Sustainable Development.

Introduction:

The Indian economy is undergoing a multidimensional transition involving changes in production, employment, technology, entrepreneurship, consumption and global integration. This transformation extends beyond aggregate economic growth to include structural changes in agriculture, industry and services, evolving labour-market patterns, digitalisation and the pursuit of inclusive and sustainable development.

India's contemporary economic structure developed through planned development, agricultural modernisation, industrialisation, public-sector expansion and infrastructure investment after independence. The 1991 balance-of-payments crisis marked a major turning point, leading to

liberalisation, privatisation and globalisation. Subsequent decades witnessed significant expansion in information technology, telecommunications, finance, professional services and other knowledge-intensive activities, while agriculture, manufacturing and MSMEs continued to play important roles in employment and economic development.

Recent national accounts estimates, based on the revised series with 2022–23 as the base year, indicate real GDP growth of 7.6 per cent and real GVA growth of 7.7 per cent in 2025–26. However, aggregate growth alone does not adequately reflect the quality or inclusiveness of economic transformation. Employment, productivity, human capital and access to economic opportunities are equally important.

According to PLFS 2025, the Worker Population Ratio for persons aged 15 years and above under usual status was 57.4 per cent, with 76.6 per cent for males and 38.8 per cent for females. The rural WPR was 61.2 per cent, compared with 49.7 per cent in urban areas, highlighting continuing gender and rural–urban differences in labour-market participation.

Technological change is further reshaping the economy through digitalisation, artificial intelligence, automation and platform-based activities. These developments create opportunities for productivity and innovation but also increase the need for digital skills, reskilling and human-capital development. MSMEs and entrepreneurship remain important for employment and innovation, while challenges related to regional disparities, urbanisation, climate change and sustainability continue to influence India's development trajectory.

Against this background, the present study examines India's economic transition through sectoral performance, employment dynamics, gender and rural–urban dimensions, technological change, emerging challenges and future prospects, with particular emphasis on achieving sustained, inclusive and sustainable economic development.

Statement of the Problem:

India's economy is experiencing significant transformation through economic growth, structural changes, digitalisation, technological advancement and global integration. However, this transition is accompanied by challenges relating to productive employment, skill development, gender participation, rural–urban disparities, manufacturing competitiveness and inclusive development. Rapid technological change and emerging economic opportunities also require continuous adaptation in skills, entrepreneurship and human capital, while climate and sustainability concerns add further complexity to long-term economic development.

The central problem of the study is to understand the **multidimensional and uneven nature of India's contemporary economic transition** and examine how economic growth, structural transformation, employment, technology, inclusion and sustainability interact in shaping the country's economic prospects.

Below is a concise literature review, keeping the title, author(s), year, and a short paragraph review for each study.

Review of Literature:

1. ***Economic Reforms in India Since 1991: Has Gradualism Worked?***

Author: Montek S. Ahluwalia. Year: 2002

Ahluwalia (2002) examined India's post-1991 economic reforms and highlighted the role of liberalisation, trade reforms, private-sector participation and market-oriented policies in transforming the Indian economy. The study provides an important foundation for understanding India's shift towards a more liberalised and globally integrated economic system.

2. ***Sources of Growth in the Indian Economy***

Authors: Barry Bosworth, Susan M. Collins & Arvind Virmani. Year: 2007

Bosworth et al. (2007) analysed India's long-term growth and identified productivity improvement and the expanding services sector as important contributors to economic growth. The study also

emphasised the importance of industrial development and productive employment for sustaining India's transformation.

3. ***Growth and Structure of Employment in India: Long Term and Post Reform Performance and the Emerging Challenge***

Authors: T. S. Papola&ParthaPratimSahu.

Year: 2012

Papola and Sahu (2012) examined changes in India's employment structure before and after economic reforms. The study highlighted the challenge of generating adequate productive employment and showed that changes in economic structure do not necessarily result in proportional employment opportunities.

4. ***Jobless Growth Through the Lens of Structural Transformation***

Authors: [Verify from original publication].

Year: 2019

The study examined India's structural transformation and employment trends and highlighted the gap between productivity growth and employment generation. It emphasised the importance of examining economic growth together with employment outcomes.

5. ***Structural Transformation and Productivity Growth in India During 1960–2010***

Authors: [Verify from original publication].

Year: 2019

The study analysed structural transformation and productivity across major sectors of the Indian economy. It highlighted the importance of productivity improvements in agriculture, industry and services for sustaining long-term economic growth.

Overall Review:

The literature indicates that India's economic transition has been shaped by economic reforms, productivity growth, structural transformation and changing employment patterns. While services have emerged as an important source of growth, employment generation and manufacturing remain significant challenges. The present study extends this literature by examining these issues alongside technology, gender participation, rural–urban differences, inclusion and sustainability in the contemporary Indian economy.

Objectives of the Study

The study is undertaken with the following objectives:

1. To examine the major dimensions of India's contemporary economic transition and structural transformation.
2. To analyze recent trends in sectoral economic performance and employment patterns in India.
3. To identify major contemporary economic challenges and emerging trends influencing India's development.
4. To assess the future prospects of the Indian economy in the context of technology, human capital, inclusion and sustainable development.

Research Methodology:

The study adopts a **descriptive and analytical research design** to examine the contemporary transition of the Indian economy. It is based entirely on **secondary data** collected from reliable and authoritative sources, including the Government of India, Economic Survey, Ministry of Statistics and Programme Implementation (MoSPI), Periodic Labour Force Survey (PLFS), Reserve Bank of India (RBI), NITI Aayog and other relevant national and international databases and reports.

The study focuses primarily on recent economic developments, with emphasis on **sectoral performance, employment, labour-market participation, rural–urban differences, gender dimensions and emerging economic trends**. Relevant indicators are presented through tables and percentage-based comparisons wherever appropriate. Descriptive statistical techniques are used to organise and interpret the data, while comparative analysis is employed to identify major changes and emerging patterns.

Data Analysis and Interpretation:

The following analysis examines India's contemporary economic transition through sectoral performance, sectoral composition, employment participation, rural–urban differences, educational dimensions of unemployment and gender-related employment patterns. The analysis uses recent official data, particularly the Economic Survey 2025–26 and PLFS 2025. PLFS is the principal official source for labour-market indicators such as LFPR, WPR and unemployment.

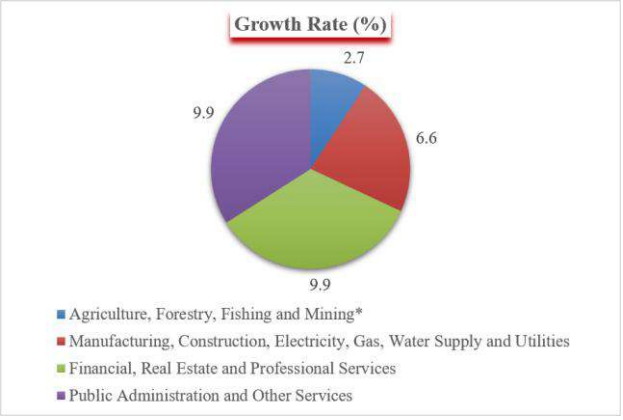
1. Sectoral Performance of the Indian Economy:

The changing performance of major sectors provides an important indication of India's structural transformation. The Economic Survey 2025–26 reports strong overall economic activity, with particularly significant contributions from services and selected industrial activities.

Table 1: Growth of Real GVA by Major Economic Activity, 2025–26

Sector Wise	Growth Rate (%)
Agriculture, Forestry, Fishing and Mining*	2.7
Manufacturing, Construction, Electricity, Gas, Water Supply and Utilities	6.6
Financial, Real Estate and Professional Services	9.9
Public Administration and Other Services	9.9

*Combined classification as reported in the source.



The data indicate that service-related activities recorded substantially higher growth than the combined primary-sector category. Financial, real estate and professional services and public administration and other services each recorded growth of 9.9 per cent, while the combined manufacturing, construction and utilities category recorded 6.6 per cent growth. This pattern illustrates the continuing importance of services in India's economic expansion, while also demonstrating the continuing role of industry and infrastructure-related activities in the structural transformation process.

2. Sectoral Composition of Nominal GVA:

The sectoral distribution of GVA further demonstrates the changing structure of the Indian economy.

Table 2: Sectoral Share in Nominal GVA

Sector	Share in Nominal GVA (%)
Services	51.1
Industry	24.3
Agriculture, Livestock, Forestry and Fishing	15.2
Manufacturing	12.8

The figures demonstrate the dominant contribution of the services sector to India's nominal GVA. Industry remains an important component, while agriculture continues to have significance beyond its direct contribution to GVA because of its role in rural livelihoods and food security. The relatively strong position of services highlights India's distinctive pattern of structural transformation, in which the expansion of services has occurred alongside continuing changes in agriculture and industry.

3. Worker Population Ratio:

Employment participation provides another important perspective on economic transformation. According to PLFS 2025, the WPR for persons aged 15 years and above under usual status (ps+ss) was 57.4 per cent at the all-India level. The

corresponding WPR was 76.6 per cent for males and 38.8 per cent for females.

Table 3: Worker Population Ratio, 2025

Category	WPR (%)
Male	76.6
Female	38.8
Persons	57.4

The difference between male and female WPR indicates an important gender dimension of India's labour market. While the overall WPR reflects the extent of participation in economic activity, the substantially different male and female rates demonstrate that aggregate economic growth does not automatically translate into equal labour-market participation.

4. Rural–Urban Employment Pattern:

The rural–urban distribution of employment provides further insight into India's economic transition.

Table 4: Rural–Urban Worker Population Ratio, 2025

Area	Male (%)	Female (%)	Persons (%)
Rural	78.4	44.9	61.2
Urban	73.0	25.9	49.7
All India	76.6	38.8	57.4

Source: PLFS 2025.

The rural WPR of 61.2 per cent was higher than the urban WPR of 49.7 per cent. The difference is particularly visible among women, with female WPR at 44.9 per cent in rural areas compared with 25.9 per cent in urban areas. These differences indicate that employment patterns are closely connected with the nature of rural and urban economic activity, household work patterns and access to employment opportunities.

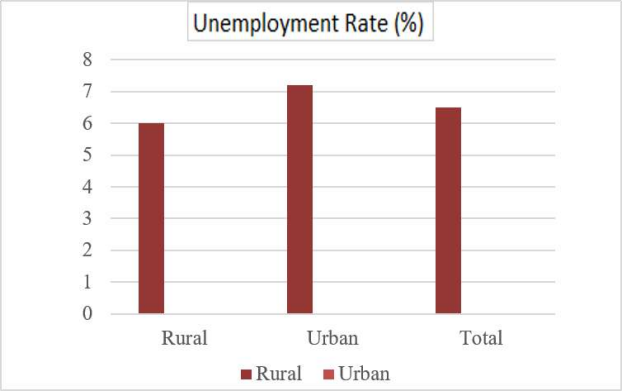
5. Employment and Educational Attainment:

Educational attainment has an important relationship with labour-market outcomes. The data indicate that unemployment remains a relevant concern among persons with secondary and higher levels of education, particularly in urban areas.

Table 5: Unemployment by Educational Attainment

Sector	Unemployment Rate (%)
Secondary and above – Total	6.5
Rural	6.0
Urban	7.2

The higher urban unemployment rate among persons with secondary and above education indicates a potential mismatch between educational qualifications and available employment opportunities. This highlights the importance of employability, vocational capabilities, digital skills and stronger linkages between education and labour-market requirements.



6. Gender Dimension of Employment:

Gender remains a significant dimension of India's employment transition. The PLFS 2025 data show a considerable difference between male and female WPR: 76.6 per cent for males compared with 38.8 per cent for females.

This difference becomes more pronounced when rural and urban areas are compared. Female WPR was 44.9 per cent in rural areas, while the corresponding urban rate was 25.9 per cent. These figures suggest that increasing female participation in productive economic activity remains an important dimension of inclusive economic transformation.

7. Interpretation of the Overall Trends:

The analysis shows that India's contemporary economic transition is marked by rapid sectoral transformation, technological change and evolving employment patterns. Services have emerged as a major driver of economic activity, particularly finance, real estate, professional and knowledge-based services. At the same time, manufacturing, construction and infrastructure remain important for strengthening productive capacity and generating employment.

However, economic growth has not resulted in equal employment opportunities for all sections of the population. The overall Workforce Participation Rate (WPR) of 57.4% hides significant gender and rural–urban differences, with female participation remaining considerably lower than male participation.

The findings also indicate that economic growth alone does not guarantee inclusive development. Greater emphasis is required on skill development, productive employment, entrepreneurship, human capital and technological adaptation. Therefore, India's future economic progress will depend on its ability to combine strong economic growth with employment generation, social inclusion, technological advancement and sustainable development.

Emerging Issues and Future Prospects:

India's economic transition is creating new opportunities while presenting challenges related to employment, skills, technology, industrial development, inclusion and sustainability. The future trajectory of the economy will depend on how effectively these interconnected issues are addressed.

1. Employment and Skill Development:

Sustained growth needs to generate productive and sustainable employment. Technological and knowledge-intensive activities are increasing demand for digital, technical and analytical skills. Strengthening vocational education, apprenticeships, reskilling and lifelong learning can improve the alignment between education and employment.

2. Digital Economy and Artificial Intelligence:

Digital payments, fintech, e-commerce, digital public infrastructure and platform-based businesses are transforming economic activity. Artificial intelligence can enhance productivity and innovation but also creates challenges related to digital skills, cybersecurity, data protection and changing employment requirements.

3. Manufacturing, MSMEs and Entrepreneurship:

Manufacturing and MSMEs remain important for employment, innovation and regional development. Their future contribution depends on better access to finance, technology, infrastructure, skilled labour and markets. Technological upgrading and stronger participation in domestic and global value chains can enhance their competitiveness.

4. Inclusive Economic Participation:

Gender and rural–urban differences remain important dimensions of India's economic transition. Greater access to skills, finance, safe employment and support infrastructure can strengthen women's participation. Rural diversification through non-farm activities, entrepreneurship, digital connectivity and improved market access can broaden economic opportunities.

5. Sustainable and Climate-Resilient Development:

Economic growth must increasingly address climate and environmental concerns. Investment in renewable energy, resource efficiency, climate-resilient infrastructure and sustainable production will be important for balancing economic expansion with environmental sustainability.

6. Global Integration and External Risks:

Global integration provides opportunities for trade, investment, technology and participation in global value chains, while also exposing India to external shocks such as trade disruptions, commodity-price volatility and changes in global demand. Strengthening domestic productive

capacity and competitiveness can improve resilience.

7. Future Prospects:

India's future prospects depend on sustained investment in human capital, infrastructure, manufacturing, digital capabilities, entrepreneurship and innovation, alongside greater attention to gender participation, regional development and sustainability. The key challenge is to convert economic and technological transformation into broad-based gains in productivity, productive employment and living standards. India's transition should therefore be understood not merely as the expansion of economic output, but as a transformation in the quality, structure and inclusiveness of economic development.

Major Findings:

The analysis of sectoral and labour-market indicators leads to the following major findings:

Services remain a major driver of India's economic transformation. Financial, real estate, professional and other service activities recorded strong growth, reflecting the increasing importance of service-oriented and knowledge-based economic activities.

Industrial development continues to be important for structural transformation. Manufacturing, construction and utilities recorded positive growth, indicating the continuing significance of industrial activity for investment, productivity and employment generation.

Economic growth and employment participation do not move uniformly across population groups. The PLFS 2025 data show substantial differences in Worker Population Ratio between males and females, indicating a continuing gender dimension in India's labour market.

Rural–urban differences remain significant. The rural WPR was higher than the urban WPR, while the difference was particularly pronounced among women. This reflects the diverse nature of employment opportunities and economic participation across rural and urban areas.

Educational attainment does not automatically ensure employment. Unemployment among persons with secondary and above education indicates the continuing importance of employability, skill development and stronger alignment between education and labour-market requirements.

Technological transformation is creating both opportunities and adjustment requirements. Digitalisation, artificial intelligence and technology-enabled economic activities have potential to improve productivity and market access, but they also increase the need for digital capabilities, reskilling and adaptability.

Entrepreneurship and MSMEs remain important to inclusive economic transformation. Their contribution to employment, innovation and regional development depends substantially on access to finance, technology, infrastructure, markets and skilled human resources.

Inclusive and sustainable development remains central to India's future economic transition. The evidence suggests that sustaining economic growth needs to be accompanied by wider employment opportunities, stronger human capital, greater participation of women and disadvantaged regions, technological adaptation and environmentally sustainable development.

Overall, the study finds that India's economic transition is characterised by **strong economic expansion and continuing structural change alongside significant employment, skill, gender, regional and sustainability challenges**. The future effectiveness of this transition will depend on the extent to which economic growth can be translated into productive employment, higher productivity and broader participation in economic opportunities.

Suggestions and Policy Implications:

Based on the analysis and major findings of the study, the following suggestions and policy implications are proposed:

Strengthen employment-oriented skill development: Skill-development programmes

should be more closely aligned with emerging requirements in manufacturing, services, digital technologies, artificial intelligence, finance and other growing sectors. Greater emphasis should be placed on practical skills, apprenticeships, internships, communication abilities and continuous reskilling.

Promote greater female economic participation: The substantial gender difference in labour-market participation highlights the need for measures that facilitate women's entry into and continuation in employment. Safe workplaces, affordable childcare, flexible work arrangements, skill development and improved access to entrepreneurship and finance can support wider participation.

Strengthen manufacturing and MSMEs: Manufacturing and MSMEs should receive stronger support through improved access to institutional finance, technology, infrastructure, skilled labour and domestic and international markets. Greater integration of MSMEs into formal supply chains can also support productivity and employment generation.

Prepare the workforce for technological change: The expansion of digitalisation and artificial intelligence requires continuous investment in digital literacy, technical education and reskilling. Educational institutions should increasingly incorporate digital competencies, data-related skills and problem-solving capabilities into their programmes.

Strengthen the link between education and employment: The presence of unemployment among educated persons indicates the importance of improving the connection between academic education and labour-market requirements. Curriculum development should give greater attention to employability, entrepreneurship, experiential learning and industry interaction.

Promote inclusive and sustainable growth: Economic development should incorporate environmental sustainability, efficient resource use, renewable energy, climate resilience and green employment. Growth strategies should also ensure that economic opportunities reach rural communities, women, youth and other economically vulnerable groups.

Taken together, these measures indicate that India's future economic strategy needs to move beyond the objective of maintaining high aggregate growth and place equal emphasis on **productive employment, human capital, technological capability, entrepreneurship, gender participation, regional balance and sustainability**. Such an approach can help make India's ongoing economic transition broader, more resilient and more inclusive.

Conclusion:

India’s economy is undergoing a significant transition marked by sustained growth, structural transformation, technological advancement and global integration. While services remain a major driver, manufacturing, MSMEs, infrastructure and agriculture are essential for broad-based development and productive employment. Future growth will depend on human capital, skills, digitalisation, innovation and entrepreneurship. Addressing gender and regional disparities, strengthening education–employment linkages and promoting sustainable development will be crucial. Overall, India’s future economic progress will depend on balancing **economic growth, productive employment, inclusion, technological preparedness and sustainability**.

References:

1. Government of India, Ministry of Finance. (2026). *Economic Survey 2025–26*. Government of India.
2. Government of India, Ministry of Statistics and Programme Implementation. (2026). *Annual report, Periodic Labour Force Survey (PLFS), 2025*. Government of India.
3. Ministry of Statistics and Programme Implementation. (2026). *National accounts statistics: Revised series with base year 2022–23*. Government of India.

4. Reserve Bank of India. (2025). *Annual report 2024–25*. Reserve Bank of India.
5. NITI Aayog. (2025). *India's path to global leadership: Strategic imperatives for Viksit Bharat @2047*. Government of India.
6. NITI Aayog. (2025). *The state of AI: Understanding the recent AI shifts and implications*. Government of India.
7. NITI Aayog. (2025). *From borrowers to builders: Women's role in India's financial growth story*. Government of India.
8. Government of India, Ministry of Micro, Small and Medium Enterprises. (2025). *Annual report 2024–25*. Ministry of Micro, Small and Medium Enterprises.
9. Government of India, Ministry of Skill Development and Entrepreneurship. (2025). *Annual report 2024–25*. Ministry of Skill Development and Entrepreneurship.
10. International Monetary Fund. (2025). *India: 2025 Article IV consultation—Press release; staff report; and statement by the executive director for India*. International Monetary Fund.
11. United Nations Development Programme. (2025). *Human development report 2025*. United Nations Development Programme.
12. International Labour Organization. (2025). *World employment and social outlook: Trends 2025*. International Labour Office.
13. Government of India, Ministry of Finance. (2025). *Economic Survey 2024–25*. Government of India.
14. Reserve Bank of India. (2024). *Annual report 2023–24*. Reserve Bank of India.
15. Reserve Bank of India. (2025). *Report on trend and progress of banking in India 2024–25*. Reserve Bank of India.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

GST 2.0 and Income Tax Reforms: Towards a Modern and Efficient Tax System in India

Dr. Ramya M.

Faculty Member, Department of Economic, USMR Arts and Commerce College, Kuvempu University, Jnanasahyadri Campus, Shankaraghatta

Corresponding Author – Dr. Ramya M.

DOI - 10.5281/zenodo.23058426

Abstract:

India's taxation framework has experienced substantial structural and technical improvements in recent years to improve efficiency, transparency, and compliance. The implementation of the Goods and Services Tax (GST) and continuous income tax reforms signify significant advancements in establishing a contemporary, digital, and cohesive tax administration. The GST 2.0 framework prioritizes the simplification of compliance, enhancement of revenue efficiency, and fortification of the input tax credit system, whilst income tax reforms concentrate on faceless assessments, diminished tax rates, and augmented taxpayer services. This paper investigates the impact of GST 2.0 and income tax modernization on the transformation of India's tax system, while assessing current advancements and problems. The study, utilizing secondary data from official reports and contemporary literature (2019–2025), concludes that digitization and structural reforms have augmented compliance, expanded the revenue base, and increased transparency. Nonetheless, challenges including compliance intricacy for small enterprises, legal disputes, and technological capability deficiencies persist. The report emphasizes the policy steps necessary to establish a streamlined, technology-oriented, and taxpayer-friendly contemporary tax structure.

Keywords: GST 2.0, Income Tax Reforms, Digital Taxation, Tax Administration, India, Tax Compliance.

Introduction:

An organized and effective tax system is essential for sustainable economic growth, fiscal stability, and equitable development. Taxes serve as the principal source of governmental revenue, facilitating public investment in infrastructure, social welfare, and economic growth initiatives. In a swiftly changing global economy marked by digitization, formalization, and heightened economic complexity, conventional tax systems must evolve to guarantee efficiency, transparency, and compliance simplicity. Contemporary tax administration increasingly prioritizes technology-driven processes, streamlined structures, enhanced taxpayer services, and data-driven enforcement measures (OECD, 2023).

India's tax system has experienced substantial structural and administrative reforms in the last decade, aimed at establishing a cohesive, transparent, and technology-driven tax structure. The introduction of the Goods and Services Tax (GST) in July 2017 was one of the most revolutionary measures. The Goods and Services Tax (GST) supplanted several indirect taxes imposed by central and state authorities with an all-encompassing value-added tax framework, thereby abolishing cascading taxation and establishing a unified national market. The reform aimed to augment tax compliance, enhance revenue efficiency, facilitate corporate operations, and promote economic formalization (Reserve Bank of India, 2023).

Although GST has significantly enhanced tax administration and broadened the indirect tax base, certain operational issues arose throughout its implementation period. This encompasses

compliance intricacies, diverse tax rate frameworks, discrepancies in input tax credits, working capital constraints for enterprises, and recurrent procedural modifications. In addressing these problems, policymakers and tax authorities have been striving for a more efficient and technology-driven system known as GST 2.0. The anticipated trajectory of GST 2.0 emphasizes rate rationalization, streamlined return filing, real-time invoice reconciliation via e-invoicing, augmented data analytics for compliance oversight, and enhanced refund processes (Ministry of Finance, 2024).

In conjunction with indirect tax reforms, India's direct tax system has experienced considerable modernization. The government has implemented a set of initiatives designed to augment transparency, diminish litigation, and improve taxpayer convenience. Principal initiatives encompass the decrease of corporate tax rates to enhance global competitiveness, the implementation of optional streamlined personal income tax regimes, anonymous assessment and appeal mechanisms, pre-filled income tax filings, and expedited refund processing. The reforms seek to diminish administrative discretion, enhance voluntary compliance, and foster confidence between taxpayers and the tax administration (Central Board of Direct Taxes [CBDT], 2023).

A significant aspect of recent tax reforms in India is the enhanced utilization of digital technologies and data integration. The establishment of platforms like the GST Network (GSTN), e-invoicing systems, Annual Information Statement (AIS), and real-time financial reporting has empowered the government to utilize big data and analytics for risk-based evaluation and fraud detection. The amalgamation of indirect tax, direct tax, and financial transaction data is progressively establishing a holistic digital tax ecosystem that facilitates policy research, revenue projection, and compliance enforcement (World Bank, 2023).

The modernization of India's tax system is intricately connected to overarching economic goals, including the formalization of the informal sector, increase of tax buoyancy, reduction of the tax gap, and improvement of the business environment. An explicit and reliable tax framework is crucial for attracting investment, fostering entrepreneurship, and facilitating sustained economic growth. Simultaneously, tax reforms must reconcile income generation with equity, simplicity, and a reduced compliance burden, especially for small and medium firms.

Notwithstanding significant advancements, some obstacles persist in realizing a completely contemporary tax system. The intricacies of compliance under GST, limitations in ability among small taxpayers, elevated instances of tax litigation, concerns regarding data security, and the necessity for enhanced coordination among various tax agencies persist as significant policy difficulties. Resolving these difficulties necessitates additional simplification, institutional fortification, and the efficient application of digital technology.

The development of GST 2.0, in conjunction with ongoing income tax reforms, signifies a pivotal stage in India's shift towards a contemporary, efficient, and technology-oriented tax administration. An exhaustive evaluation of these reforms is crucial to comprehend their effects on compliance, revenue generation, taxpayer experience, and overall economic formalization. This paper analyzes the impact of GST 2.0 and income tax modernization on the transformation of India’s tax system, while investigating the obstacles and policy actions necessary for establishing a streamlined, transparent, and sustainable tax framework.

Review of Literature:

Recent studies underscore the influence of GST on tax compliance and revenue efficiency. The Reserve Bank of India (2023) indicated that GST has enhanced tax buoyancy and mitigated cascade consequences. Gupta and Khandelwal (2021) discovered that GST improved supply chain efficiency and the formalization of enterprises. The Ministry of Finance (2024) observed that GST

collections have exhibited consistent rise attributed to enhanced compliance and digital oversight via e-invoicing and e-way bills. The World Bank (2022) highlighted that digital tax systems diminish evasion and enhance administrative efficiency. Income tax reforms have been extensively analyzed. The use of faceless assessment has diminished discretionary authority and enhanced openness (CBDT, 2023). The OECD (2024) indicated that digital tax administration enhances voluntary compliance and decreases administrative expenses. Numerous studies highlight concerns include compliance difficulty for MSMEs, difficulties in technological adaption, and rapid regulatory alterations (Economic Survey, 2023).

Objectives of the Study:

The research has two main objectives. The primary purpose is to analyze the impact of GST 2.0 and income tax reforms on the modernization of India's tax system via enhanced efficiency, transparency, and digitization. The second purpose is to examine recent trends to discern critical problems and necessary policy actions for establishing a streamlined, technology-driven, and taxpayer-friendly tax administration.

Methodology:

The research utilizes secondary data obtained from credible sources, including the Ministry of Finance, Central Board of Indirect Taxes and Customs (CBIC), Central Board of Direct Taxes (CBDT), Reserve Bank of India, Economic Survey reports, and international entities such as the World Bank and OECD. Furthermore, recent scholarly works and policy reports released from 2019 to 2025 were examined to ascertain contemporary advancements in GST and income tax modifications.

A descriptive and analytical research design was employed. The gathered data was categorized into topical domains including GST performance, digital compliance systems, income tax modernization, taxpayer services, and revenue trends. A theme synthesis method was employed to evaluate the effects of these measures on the efficiency of tax administration and compliance behavior.

Trends and Progress in GST and Income Tax Modernization:

India's tax administration has experienced a significant transformation via digitalization, data integration, and structural reforms in both indirect and direct taxation. The objective of these modifications is to augment compliance, diminish tax evasion, elevate transparency, and foster a taxpayer-friendly atmosphere.

GST System Transformation and the Move toward GST 2.0:

Since its inception in 2017, GST has markedly enhanced the efficiency of the indirect tax system by abolishing cascading taxes and establishing a cohesive national market. The GST ecosystem has developed over time through many technical and policy interventions, which collectively provide the foundation of GST 2.0.

The introduction of e-way bills, which monitor the transportation of products and mitigate tax cheating, represents a significant advancement. The use of e-invoicing for major taxpayers, followed by its incremental application to smaller enterprises, has facilitated real-time transaction reporting and enhanced input tax credit (ITC) reconciliation. Tax agencies are now employing advanced data analytics and artificial intelligence capabilities to detect abnormalities, identify fraudulent invoicing networks, and enhance enforcement effectiveness (CBIC, 2024).

GST 2.0 emphasizes rate rationalization, the ease of return filing, and the enhancement of the ITC mechanism to mitigate disputes. The consistent rise in GST receipts indicates enhanced compliance and the formalization of economic activities.

Table 1: Growth in GST Collections in India

Year	Average Monthly GST Collection (₹ lakh crore)
2018–19	0.98
2020–21	1.11
2022–23	1.51
2024–25*	1.75

***Provisional**

Source: Ministry of Finance (2024); GST Council Reports.

The steady increase in GST collections signifies enhanced compliance, economic resurgence, and the efficacy of digital oversight tools like e-invoicing and analytics-driven enforcement. The rise also indicates the progressive formalization of enterprises and the broadening of the tax base.

Income Tax Modernization and Digital Transformation:

The direct tax system has experienced considerable modernization via the implementation of digital technologies and procedural modifications. The implementation of the faceless assessment and appeal system has diminished direct engagement between taxpayers and tax officials, thereby reducing discretion and corruption while enhancing openness.

The introduction of pre-filled income tax returns, utilizing data from financial institutions, employers, stock markets, and GST submissions, has streamlined compliance and minimized errors. The implementation of the Annual Information Statement (AIS) and Taxpayer Information Summary (TIS) has augmented the precision of income reporting and bolstered voluntary compliance (CBDT, 2023).

Additional modifications encompass expedited refund processing, digital grievance resolution procedures, and optional streamlined personal tax frameworks aimed at diminishing compliance intricacy.

Table 2: Digital Initiatives in Income Tax Administration

Initiative	Impact
Faceless assessment	Reduced discretion and improved transparency
Pre-filled returns	Simplified compliance and reduced errors
AIS/TIS	Improved reporting and reduced under-reporting
Online refunds and e-verification	Faster processing and improved taxpayer experience

Source: CBDT (2023); Ministry of Finance (2024)

These digital initiatives have markedly enhanced administrative efficiency and taxpayer convenience. Automation and data integration have diminished compliance expenses and promoted voluntary tax reporting, facilitating the growth of the direct tax base.

Challenges in Building a Modern Tax System:

Notwithstanding significant advancements, certain structural and operational obstacles persistently hinder the efficacy of India's tax modernization initiatives.

A significant difficulty in GST is the compliance cost imposed on micro, small, and medium enterprises (MSMEs). The necessity for multiple return files, reconciliation mandates, and frequent procedure modifications escalates compliance expenses and administrative intricacy. Numerous small enterprises have challenges in transitioning to digital systems owing to constrained technical capabilities and insufficient expert assistance.

The intricate rate structure under GST presents another challenge. The existence of various tax brackets engenders classification conflicts and escalates litigation. Delays in input tax credit returns and discrepancies between supplier and receiver data impose working capital constraints on enterprises (RBI, 2023).

Technological problems continue to be a significant issue. Despite substantial improvements in the GST Network (GSTN), periodic system problems, portal unavailability, and data integration concerns still hinder compliance efficiency. With the tax system becoming progressively data-centric, apprehensions around cybersecurity and data privacy have similarly intensified.

The income tax system is hindered by elevated lawsuit levels and protracted dispute settlement, adversely impacting administrative efficiency. While faceless assessment has enhanced openness, taxpayers have had difficulties about communication deficiencies and procedural ambiguity. The possible dual tax structure for people has introduced complexity into tax planning.

A significant issue is the inadequate tax base in relation to the economy's magnitude. Notwithstanding advancements, a significant portion of the informal sector continues to be excluded from the direct tax framework. Enhancing data connectivity across GST, income tax, and financial systems is crucial for augmenting tax compliance and expanding the revenue base (Economic Survey, 2023).

Policy Implications for a Modern Tax System:

To attain a comprehensive and effective tax system, additional improvements are necessary in both GST and income tax administration.

a) The simplicity of the GST system should be prioritized. Consolidating tax brackets into fewer rates and streamlining return filing processes will diminish compliance expenses and legal disputes. Enhancing the composition scheme and offering tailored compliance assistance for MSMEs can facilitate increased voluntary compliance.

b) Enhancing digital infrastructure and data integration is essential. Utilizing advanced analytics, artificial intelligence, and real-time data exchange among GST, income tax, customs, and financial institutions will improve risk-based assessments and mitigate tax evasion. Simultaneously, comprehensive cybersecurity protocols must be established to safeguard taxpayer information.

c) The enhancement of capacity building and taxpayer education is necessary. Awareness initiatives, accessible platforms, and streamlined instructional resources can enhance compliance, especially among small enterprises and individual taxpayers.

d) Broadening the range of pre-filled returns and enhancing automatic compliance within the income tax system will significantly alleviate the load on taxpayers. Enhancing alternative dispute resolution systems, like mediation and expedited appellate procedures, can mitigate litigation.

e) The amalgamation of indirect and direct tax data into a cohesive digital tax ecosystem will enhance policy research, refine revenue projections, and encourage economic formalization. An stable and predictable tax policy framework is crucial for bolstering investor confidence and fostering sustained economic growth.

Conclusion:

The implementation of GST 2.0 and income tax reforms signifies a substantial advancement in establishing a transparent, efficient, and technology-oriented tax system in India. The processes of digitalization, simplification, and data integration have enhanced compliance and revenue outcomes. Addressing compliance complexity, technical capacity, and taxpayer support is vital for establishing a really modern tax administration that fosters economic growth and formalization.

References:

1. Central Board of Direct Taxes. (2023). *Annual report*. Government of India.
2. Central Board of Indirect Taxes and Customs. (2024). *Annual report*. Government of India.
3. Economic Survey. (2023). *Government of India*.

4. Fifteenth Finance Commission. (2021). *Report of the Finance Commission*.
5. GST Council. (2024). *GST performance and reform updates*.
6. Gupta, P., & Khandelwal, A. (2021). GST and formalization of the Indian economy. *Economic and Political Weekly, 56*(12).
7. International Monetary Fund. (2022). *Revenue administration modernization*. IMF.
8. Keen, M., & Lockwood, B. (2020). The value-added tax: Its causes and consequences. *Journal of Development Economics, 92*(2), 138–151.
9. Ministry of Finance. (2024). *GST revenue statistics*. Government of India.
10. OECD. (2023). *Tax administration 2023: Digital transformation*. OECD Publishing.
11. OECD. (2024). *Tax administration digital transformation*.
12. Reserve Bank of India. (2023). *Report on state finances and taxation*. RBI.
13. World Bank. (2022). *Digital tax administration and compliance*.
14. World Bank. (2023). *Digital public finance and tax administration reforms*. World Bank.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Sustainable Development and Rural–Urban Transformation in India: A Political Economy Perspective

Dr. Nagangouda Patil P[1] & Dr. Manjunath N. Lamani[2]

[1]*Lecturer, Department of Economics Government First Grade College Vitla, Tq: BantawalDist: Dakshin Kannada-574243*

[2]*Lecturer, Department of Political Science, SSS Government First Grade College Mudalagi 591312 Belagavi Karnataka India.*

Corresponding Author – Dr. Nagangouda Patil P

DOI - 10.5281/zenodo.23058437

Abstract:

Sustainable development in India is increasingly shaped by the interaction between rural transformation, urbanisation, economic growth and political governance. The traditional separation between rural and urban development is becoming less relevant as flows of labour, capital, commodities, technology, information and public services increasingly connect villages, small towns, peri-urban regions and metropolitan centres. The Sustainable Development Goals (SDGs), particularly Goals 8, 9, 10, 11, 13 and 16, place economic growth, infrastructure, inequality, sustainable settlements, climate resili

The study is based exclusively on secondary sources, including government reports, policy documents, statistical publications, international reports and academic literature. Recent policy frameworks such as the SDG India Index, Economic Survey, rural connectivity programmes and urban development initiatives demonstrate the growing importance of integrated territorial development.

The article argues that sustainable rural–urban transformation requires more than physical infrastructure or higher GDP growth. It requires accountable institutions, effective decentralisation, equitable public investment, employment-oriented growth, environmental sustainability and stronger coordination between different levels of government. The study concludes that an integrated rural–urban policy framework can contribute to inclusive economic development while reducing spatial inequalities and strengthening democratic governance.

Keywords: Sustainable Development, Rural–Urban Transformation, Political Economy, Governance, Economic Growth, Decentralisation, Urbanisation, Rural Development, India, Inclusive Growth.

Introduction:

India's development trajectory is characterised by simultaneous rural transformation, urbanisation and structural economic change. Agriculture continues to provide livelihoods to a large section of the population, while manufacturing, services, construction, digital activities and urban employment are becoming increasingly important components of economic transformation. Consequently, rural and urban economies can no longer be understood as isolated spheres. Rural areas supply food, labour, natural resources and raw materials to urban centres, while towns and cities provide markets, employment, education, healthcare, financial services, technology and administrative facilities to surrounding rural communities.

The concept of sustainable development provides an important framework for understanding this transformation. The 2030 Agenda connects poverty reduction, economic growth, decent employment, infrastructure, inequality, sustainable settlements, climate action and effective institutions. In particular, SDG 11 explicitly recognises the importance of positive economic, social and

environmental connections between urban, peri-urban and rural areas.

Political Science perspective, rural–urban transformation is fundamentally a question of governance, power, institutions, participation and distribution of public resources. Decisions concerning infrastructure, land, taxation, welfare, employment, environmental regulation and public services influence who benefits from economic transformation. From an Economics perspective, the process involves structural transformation, productivity, labour mobility, investment, employment, markets and income distribution.

The political economy approach therefore provides a useful framework because it examines how economic policies and political institutions interact. Rural roads, digital connectivity, irrigation, urban infrastructure, employment programmes, municipal services and local governments are not merely economic instruments; they are also components of governance and state capacity.

UN-Habitat similarly emphasises that rural and urban areas should not be treated as separate development spaces because they are connected through flows of people, goods, services, finance, information and natural resources [5][6].

Objectives of the Study:

The study has the following objectives:

1. To examine the relationship between sustainable development and rural–urban transformation in India.
2. To analyse the role of governance and political institutions in rural and urban development.
3. To examine the relationship between rural–urban transformation and economic growth.
4. To analyse employment, infrastructure and public-service challenges associated with rural–urban transformation.
5. To suggest policy measures for achieving inclusive, balanced and environmentally sustainable rural–urban development.

Research Methodology:

The study is qualitative and analytical in nature and is based entirely on secondary data. Information has been collected from Government of India reports, NITI Aayog publications, Economic Survey reports, Ministry of Statistics and Programme Implementation publications, Ministry of Rural Development documents, Ministry of Housing and Urban Affairs documents, United Nations reports, UN-Habitat publications, World Bank reports and relevant academic literature.

Conceptualizing Sustainable Development:

Sustainable development involves balancing economic development, social justice and environmental protection. The 2030 Agenda identifies sustained and inclusive economic growth, decent work, resilient infrastructure, reduced inequality, sustainable cities and effective institutions as interconnected objectives. For India, sustainable development can therefore be understood through three interconnected dimensions:

1. Economic Sustainability: Economic sustainability requires productive employment, investment, infrastructure, technological development and efficient use of resources. Economic growth becomes more meaningful when it generates employment and improves living standards across regions.

2. Social Sustainability: Social sustainability requires equitable access to education, healthcare, housing, social security, sanitation, transport and economic opportunities. Rural and urban inequalities can undermine the benefits of economic growth.

3. Environmental Sustainability: Rapid urbanisation and industrialisation create pressures on land, water, air, forests and other natural resources. Sustainable development therefore requires resource efficiency, climate resilience, waste management and environmentally responsible infrastructure.

Rural–Urban Transformation in India:

Rural–urban transformation in India refers to the growing economic, social, demographic and political connections between villages, towns and cities. It involves migration, infrastructure development, expansion of non-farm activities, changing livelihoods and increasing access to urban markets and services.

1. Rural–Urban Linkages: Rural and urban areas are increasingly interconnected through the movement of people, goods, capital, technology and information. These linkages support regional economic development.

2. Migration and Employment: Rural people migrate to towns and cities in search of employment, education and better services. At the same time, remittances and urban demand contribute to rural household incomes.

3. Infrastructure Development: Roads, transport, electricity, telecommunications and digital connectivity improve access between rural and urban areas. Better connectivity facilitates markets, employment and public services.

4. Growth of Small Towns: Small and intermediate towns act as important links between villages and larger cities. They provide markets, education, healthcare, banking, employment and other essential services to surrounding rural communities.

5. Economic Transformation: Agriculture is increasingly connected with manufacturing, services, trade and agro-processing. This diversification creates new economic opportunities and strengthens rural–urban economic integration.

6. Governance and Planning: Rural–urban transformation requires coordination among Panchayats, municipalities, state governments and other institutions. Integrated planning can reduce regional inequalities and promote balanced and sustainable development.

Political Economy of Rural–Urban Transformation:

The political economy perspective examines how political institutions influence economic decisions and how economic changes reshape political relationships.

1. State and Development: The state remains central to rural–urban transformation through taxation, public expenditure, infrastructure investment, welfare programmes, land regulation and economic policy. Development is therefore not simply a market-driven process; it is also shaped by institutional choices.

2. Governance and Public Resources: The allocation of roads, water supply, schools, hospitals, transport systems and digital infrastructure influences regional development. Public investment can either reduce spatial inequalities or reinforce existing disparities depending upon institutional priorities and implementation capacity.

3. Decentralization: Democratic decentralisation gives local institutions an important role in identifying local development priorities. Panchayats and municipalities can improve participatory governance when they possess adequate financial resources, administrative capacity and decision-making authority.

4. Multi-Level Governance: Rural–urban transformation requires cooperation between the Union Government, State Governments, district administrations, Panchayats, municipalities and other stakeholders. UN-Habitat's framework specifically emphasises multi-level and multi-sectoral governance for integrated territorial development.

Economic Growth and Structural Transformation:

Economic growth and rural–urban transformation are closely interconnected. As economies diversify, labour gradually moves across agriculture, manufacturing, construction and services. Cities and towns often become centres of industrial, commercial, financial and technological activities.

Economic growth alone does not guarantee inclusive development. The quality of employment, distribution of income, access to public services and

environmental consequences must also be considered. The World Bank's current India framework emphasises job-rich growth, urban transformation, rural prosperity, infrastructure, renewable energy, diversified value chains, human capital and climate resilience as interconnected development priorities.

Rural Development, Participation and Democratic Governance:

1. Decentralisation and Local Governance: Decentralisation strengthens grassroots democracy by transferring responsibilities and decision-making powers to Panchayati Raj Institutions. It enables local governments to identify rural needs and implement development programmes according to local priorities.

2. People's Participation: People's participation is essential for effective rural development. Through Gram Sabhas and community institutions, citizens can participate in planning, discuss local problems, monitor government programmes and contribute to development decisions.

3. Transparency and Accountability: Transparent administration and social audits help citizens monitor public expenditure and development programmes. Greater accountability can improve the efficiency of government schemes and strengthen public trust in local institutions.

4. Social Inclusion and Political Empowerment: Democratic participation provides opportunities for women and socially disadvantaged groups to participate in local decision-making. Political representation can improve their voice in development planning and promote more inclusive governance.

5. Rural Economic Development: Effective local governance can support roads, irrigation, employment, skill development, markets and basic services. These measures strengthen rural livelihoods and improve connections between rural economies and nearby towns and cities.

6. Sustainable Rural Development: Rural development should balance economic progress with social equity and environmental protection. Participatory governance can help local communities incorporate issues such as water conservation, natural-resource management and climate resilience into development planning.

Political Institutions and Economic Development:

Political institutions play a significant role in shaping economic development by influencing public policy, resource distribution, investment, employment and social welfare. Effective institutions can promote inclusive growth, while weak governance may create implementation gaps and unequal access to development opportunities.

1. Governance and Economic Policy: Effective governance helps formulate and implement consistent economic policies. Stable institutions can improve the delivery of infrastructure, welfare programmes and development initiatives.

2. Rule of Law and Investment: The rule of law provides legal certainty and protects property and contractual rights. A predictable institutional environment can encourage investment, entrepreneurship and long-term economic activity.

3. Public Resource Management: Transparent management of public resources helps direct government expenditure towards education, healthcare, infrastructure and employment. Accountability mechanisms can improve the efficiency of public spending.

4. Democratic Participation: Democratic institutions provide citizens with opportunities to influence public policies and development priorities. Participation can make economic policies more responsive to diverse social and regional needs.

5. Decentralisation and Local Development: Decentralised institutions allow local governments to identify and address area-specific economic challenges. Strong Panchayats and municipalities can contribute to rural development, urban services and balanced regional growth.

6. Inclusive Economic Development: Political institutions influence how the benefits of economic

growth are distributed across different sections of society. Inclusive policies can improve access to employment, education, healthcare and social protection.

7. Institutional Coordination: Economic development requires coordination among central, state and local governments. Effective coordination can reduce duplication, improve policy implementation and strengthen rural–urban development linkages.

Overall, strong, accountable and participatory political institutions provide an important foundation for sustainable and inclusive economic development.

Discussion and Analysis:

The analysis demonstrates that India's rural–urban transformation cannot be explained exclusively through economic growth or demographic urbanisation. It represents a broader transformation in the relationship between state, market and society. Economic development creates new markets and employment opportunities, while political institutions determine how resources and opportunities are distributed. From an Economics perspective, rural–urban integration can increase productivity through improved market access, labour mobility, infrastructure and diversification. From a Political Science perspective, however, the sustainability of this transformation depends upon decentralisation, accountability, participation, institutional capacity and public policy.

The two perspectives therefore complement each other. Economic growth without inclusive governance may increase spatial and social inequalities. Conversely, governance without productive economic opportunities may be insufficient to generate sustained improvements in living standards.

India's current policy architecture increasingly recognises this interdependence. The SDG framework integrates economic, social, environmental and institutional objectives. NITI Aayog's SDG framework provides a mechanism for monitoring progress and localisation. The Economic Survey 2025–26 separately identifies rural development, infrastructure, employment and urbanisation as important dimensions of the development process.

The emerging policy direction therefore suggests that the rural–urban divide should increasingly be replaced by a rural–urban continuum approach based on integrated territorial development.

Findings and Recommendations:

1. Rural–Urban Integration: Rural and urban economies are increasingly interconnected through migration, markets, infrastructure and technology.
2. Infrastructure and Growth: Improved connectivity and infrastructure support economic growth and access to essential services.
3. Unequal Development: Regional, income and rural–urban inequalities continue to affect inclusive development.
4. Governance: Effective decentralisation, participation and accountability are essential for sustainable development.
5. Employment: Economic transformation creates opportunities but informal work and skill gaps remain major challenges.

Recommendations:

1. Integrated Planning: Adopt coordinated rural–urban planning for balanced regional development.
2. Local Governance: Strengthen Panchayats and municipalities through greater resources and administrative capacity.
3. Sustainable Infrastructure: Expand transport, digital connectivity, water, sanitation and renewable-energy infrastructure.
4. Inclusive Growth: Promote MSMEs, agro-processing, rural industries, entrepreneurship and skill development.

5. Democratic Participation: Strengthen citizen participation, transparency, social audits and accountability in development programmes.

Conclusion:

Sustainable development and rural–urban transformation are closely connected dimensions of India's political and economic development. The transformation of rural areas, small towns and cities is generating new opportunities for economic diversification, employment, infrastructure development and social mobility. At the same time, it is creating challenges involving inequality, migration, environmental pressure, urban infrastructure and institutional capacity.

The political economy perspective demonstrates that sustainable development cannot be achieved through economic growth alone. Growth must be supported by effective governance, democratic participation, decentralisation, social inclusion and environmental responsibility. Similarly, rural development and urban development should not be treated as competing policy priorities. They constitute interconnected components of a single territorial development process.

The future of India's sustainable development will therefore depend substantially on the capacity of governments at different levels to coordinate infrastructure, employment, social services, environmental management and economic policy. Strengthening rural–urban linkages, supporting small and intermediate towns, improving local governance and promoting employment-oriented economic growth can contribute to a more balanced development process.

Bibliography:

1. Amartya Sen, Development as Freedom, Oxford University Press, New Delhi, 1999.
2. Jean Drèze and Amartya Sen, India: Development and Participation, Oxford University Press, New Delhi, 2002.
3. B. B. Misra, The Indian Economy: Its Development and Problems, Oxford University Press, New Delhi.
4. D. T. Lakdawala, Poverty and Unemployment in India, Institute of Social Sciences, New Delhi.
5. Paul R. Brass, The Politics of India Since Independence, Cambridge University Press, 1994.
6. Niraja Gopal Jayal, Democracy in India, Oxford University Press, New Delhi, 2001.
7. M. P. Singh and Rekha Saxena, Indian Politics: Contemporary Issues and Concerns, PHI Learning, New Delhi.
8. M. A. Oommen, Fiscal Decentralisation to Rural Governments in India, Institute of Social Sciences, New Delhi.
9. Abdul Aziz, Decentralised Governance in India: Emerging Issues, Sage Publications, New Delhi.
10. N. Sivanna, Rural Development and Panchayati Raj in Karnataka, University of Mysore, Mysuru.
11. M. Govinda Rao and Nirvikar Singh, Political Economy of Federalism in India, Oxford University Press, New Delhi, 2005.
12. R. S. Deshpande, Agrarian Change and Rural Development in Karnataka, Institute for Social and Economic Change, Bengaluru.
13. G. S. Mehta, Rural Development in Karnataka, Himalaya Publishing House, Mumbai.
14. Government of Karnataka, Karnataka Economic Survey, Department of Planning, Programme Monitoring and Statistics, Bengaluru.
15. Institute for Social and Economic Change (ISEC), Karnataka Human Development Report, Government of Karnataka, Bengaluru.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Contemporary Challenges and Emerging Trends in the Indian Economy: A Comprehensive Structural Analysis

Vagesh Chavadi
Faculty, Department of Economics
Soniya BA and BCOM Degree College, Dharwad, Karnataka
Corresponding Author – Vagesh Chavadi

DOI - 10.5281/zenodo.23058459

Abstract:

The Indian economy stands at a pivotal historical juncture, characterized by rapid macroeconomic expansion, significant technological disruptions, and profound structural shifts, alongside persistent socio-economic vulnerabilities. As India asserts its position as the fastest-growing major economy globally, it faces a complex dual reality: high GDP growth figures coexisting with structural bottlenecks in job creation, climate vulnerabilities, agrarian risks, and fiscal imbalances. This paper provides an exhaustive, multi-dimensional academic evaluation of contemporary challenges and emerging trends shaping the Indian economy in the mid-2020s. Examining key domains—including the agrarian distress and sustainable farming transition, manufacturing performance and the Make in India 2.0 initiative, the rapid transformation of digital public infrastructure (DPI), labor market dynamics, fiscal-monetary coordination, green energy transition, and foreign direct investment (FDI) patterns—this study offers actionable policy insights grounded in current empirical and theoretical frameworks. By critically analyzing structural transformations alongside existing systemic frictions, the paper argues that achieving sustainable, inclusive, and resilient growth by 2047 requires synchronized institutional reforms, aggressive human capital accumulation, targeted industrial policy, and climate-resilient agricultural strategies.

Keywords: Indian Economy, Structural Reforms, Digital Public Infrastructure, Agrarian Distress, Make in India, Green Energy Transition, Labor Market Dynamics, Fiscal Consolidation, Inclusive Growth.

Introduction: The Macroeconomic Context:

The trajectory of the Indian economy over the past three decades presents one of the most dynamic economic transformation stories in modern history. Following the landmark liberalisation, privatisation, and globalisation (LPG) reforms of 1991, India transitioned from a heavily regulated, inward-looking economic framework toward a dynamic, market-driven macroeconomic paradigm. In recent years, despite global economic volatility, supply chain dislocations, inflationary shocks, and geopolitical frictions, India has demonstrated remarkable macroeconomic resilience, asserting itself as a primary engine of global economic growth.

However, underneath the headline growth narratives lies a complex economic architecture marked by deep-seated structural contradictions. The post-pandemic recovery trajectory has highlighted significant divergence across economic sectors, income groups, and geographical regions. While the high-skilled services sector and technology-driven industries have witnessed exponential expansion, labor-intensive manufacturing and the broad rural economy have experienced variable growth momentum. Consequently, Indian policy planners face the challenging task of navigating high growth expectations alongside domestic realities such as underemployment, income inequality, agricultural sector vulnerability, and environmental degradation.

This paper undertakes an in-depth academic inquiry into the contemporary challenges and emerging trends characterizing the Indian economy. By integrating rigorous theoretical perspectives with contemporary macroeconomic data, this study seeks to provide a holistic diagnostic of India's current structural posture, offering pragmatic policy measures designed to support sustainable, equitable, and resilient development.

Agrarian Transformation And Structural Stress:

The agricultural sector continues to serve as the social and structural backbone of the Indian economy, employing approximately 43% to 45% of the national workforce while contributing around 16% to 18% of Gross Value Added (GVA). This sharp asymmetry between employment share and economic output underscores the fundamental structural challenge of low labor productivity in Indian agriculture.

1. Land Fragmentation and Productivity Constraints:

One of the structural impediments facing Indian agriculture is the persistent fragmentation of land holdings. According to agricultural census data, over 86% of operational land holdings in India belong to small and marginal farmers who cultivate plots smaller than two hectares. The average operational holding size has progressively shrunk to less than 1.08 hectares. Small land holdings severely constrain capital investments, block farm mechanization, lower economies of scale, and weaken smallholder bargaining power in input and output markets.

2. Climate Vulnerabilities and Water Scarcity:

Indian agriculture remains highly vulnerable to climate change and monsoon unpredictability. Nearly 50% of the net sown area remains rainfed, leaving agricultural yields dependent on seasonal rainfall variations. Extreme climate events—such as heatwaves, irregular monsoons, flash floods, and prolonged dry spells—are increasing in frequency and severity, undermining crop productivity and farmer incomes. Furthermore, distorted subsidy frameworks for groundwater extraction and chemical fertilizers have accelerated soil degradation and depleted groundwater tables in key agrarian regions such as Punjab, Haryana, and western Uttar Pradesh.

3. Market Distortions, APMC Reforms, and Supply Chains:

Agricultural marketing in India continues to encounter operational inefficiencies. Although the Agricultural Produce Market Committee (APMC) architecture was originally instituted to safeguard farmers from buyer exploitation, it has frequently fostered localized monopolies, high transaction costs, and opaque price discovery mechanisms. The presence of numerous intermediaries between farm gates and urban consumer markets depresses the farmer's share of consumer spending while causing food inflation. Sustainable solutions require upgrading physical cold-chain infrastructure, expanding direct farm-to-market channels, strengthening Farmer Producer Organizations (FPOs), and broadening national platforms like e-NAM (Electronic National Agriculture Market).

4. Manufacturing, Industrial Policy, And 'Make In India 2.0':

A historic feature of India's structural development is its direct transition from a predominantly agrarian economy to a service-led economy, effectively bypassing the traditional phase of labor-intensive manufacturing expansion. While the services sector has generated substantial export revenue and value-added growth, it has lacked the structural capacity to absorb millions of low-to-medium-skilled workers transitioning out of agriculture.

5. The Manufacturing Growth Deficit:

Despite long-standing policy targets to increase manufacturing's share of Gross Domestic Product (GDP) to 25%, the sector's contribution has persistently hovered around 14% to 17%. Key factors contributing to this trend include restrictive labor regulations, high logistics costs (historically around 13-14% of GDP), complex land acquisition processes, expensive capital borrowing, and

unreliable energy supply. Consequently, Indian domestic firms have struggled to achieve scale and competitiveness relative to regional manufacturing peers in East and Southeast Asia.

6. Production Linked Incentive (PLI) Schemes and Global Supply Chains:

To revitalize industrial output and position India within global value chains (GVCs), the Government introduced the Production Linked Incentive (PLI) scheme across 14 key manufacturing sectors, including electronics, pharmaceuticals, automobiles, advanced chemistry cells, and specialized steel. By linking financial subsidies directly to incremental domestic sales and capital investment, the PLI framework aims to offset structural cost handicaps, encourage import substitution, and incentivize global manufacturers to establish operations in India under 'China Plus One' supply chain realignment strategies. Initial successes in mobile phone manufacturing highlight the framework's potential, though sustained success requires building robust domestic supplier ecosystems.

7. Infrastructure Development and PM Gati Shakti:

Recognizing infrastructure as a primary driver of industrial productivity, India launched the PM Gati Shakti National Master Plan alongside the National Infrastructure Pipeline (NIP). By leveraging GIS-based spatial planning, PM Gati Shakti seeks to integrate multi-modal transportation networks—comprising railways, roadways, ports, and inland waterways—thereby eliminating logistics bottlenecks, lowering freight transit times, and reducing freight costs toward global benchmark levels (8-9% of GDP).

Digital Public Infrastructure (DPI) And The Leapfrogging Economy:

Perhaps the most transformative economic trend in contemporary India is the rapid development and deployment of Digital Public Infrastructure (DPI), frequently referenced as the 'India Stack'. By building open, interoperable, and scalable digital rails, India has achieved structural modernization in financial inclusion, public service delivery, and digital commerce at an unprecedented speed.

1. The JAM Trinity and Financial Inclusion:

The integration of Jan Dhan accounts, Aadhaar biometric identity, and Mobile connectivity (the JAM Trinity) has established the bedrock for public finance and social welfare delivery. Historically, welfare delivery was affected by leakages, administrative friction, and high operational overheads. Through direct benefit transfers (DBT), the Indian state has transferred trillions of rupees directly into beneficiary bank accounts, substantially reducing fiscal leakages and ensuring targeted delivery of government support.

2. Unified Payments Interface (UPI) and the Cashless Ecosystem:

The launch and explosive growth of the Unified Payments Interface (UPI), developed by the National Payments Corporation of India (NPCI), has reshaped the retail payments environment. By processing billions of transactions per month, UPI has democratized digital transactions across urban centers and rural villages alike. Micro-merchants, street vendors, and small enterprises can now access formal financial services, build credit profiles based on digital transaction histories, and participate directly in the formal economic ecosystem.

3. ONDC, Account Aggregators, and the Next Wave of DPI:

Building on the success of digital payments, India is advancing second-generation DPI frameworks. The Open Network for Digital Commerce (ONDC) aims to unbundle e-commerce platforms, breaking proprietary monopolies and empowering small retail businesses to access online consumers without paying exorbitant platform commissions. Simultaneously, the Account Aggregator (AA) framework facilitates secure, consent-based financial data sharing, paving the way for cash-flow-based lending to Micro, Small, and Medium Enterprises (MSMEs) that have traditionally lacked collateral assets.

Demographic Dividend, Labor Markets, And Skill Development:

India possesses a unique demographic structure. With a median age of around 28 years and over 65% of its population in the working-age group (15–64 years), India enjoys a demographic window of opportunity that is projected to last until the late 2040s. However, turning this demographic potential into an economic dividend requires creating high-quality, formal employment opportunities at scale.

1. The Employment Challenge and Informality:

A primary macroeconomic challenge facing the country is the high degree of labor market informality. Approximately 85% to 90% of the Indian workforce operates in the informal sector, lacking formal employment contracts, job security, social safety nets, and pension benefits. While total GDP growth remains strong, employment elasticity—the responsiveness of job creation to GDP growth—has remained relatively subdued, leading to concerns regarding 'jobless growth' or labor absorption deficits.

2. Female Labor Force Participation Rate (FLFPR):

Another critical challenge is the historically low female labor force participation rate. While recent national surveys indicate a gradual recovery—driven in part by rural self-employment—the FLFPR in India remains below potential when compared to other emerging markes. Socio-cultural factors, unpaid domestic and caregiving responsibilities, safety concerns, and structural shortages of suitable urban formal jobs continue to limit female economic participation. Elevating female employment is essential for expanding total factor productivity and raising potential output growth.

3. Skill Mismatch and Education Quality:

The gap between institutional educational outcomes and industry skill requirements remains a structural constraint. Thousands of graduates enter the labor force annually without the technical, digital, or vocational skills required by modern industrial and tech-driven sectors. Addressing this skill deficit requires comprehensive reforms aligned with the National Education Policy (NEP) 2020, expanded industry-academia integration, and scalable vocational training initiatives under the Skill India Mission.

Fiscal-Monetary Dynamics And Inflation Management:

Navigating macroeconomic stability requires synchronized fiscal policies from the Ministry of Finance and monetary actions from the Reserve Bank of India (RBI). Balancing inflation management, growth acceleration, and public debt sustainability remains a ongoing priority.

1. Fiscal Consolidation vs. Capital Expenditure Push:

In the post-pandemic era, Indian fiscal strategy has shifted toward a high-quality capital expenditure (CapEx) expansion. By prioritizing public investments in physical infrastructure—such as highways, railway corridors, power grids, and ports—the central government has sought to crowd-in private capital investment. Simultaneously, the fiscal consolidation roadmap aims to lower the central government's fiscal deficit toward 4.5% of GDP, ensuring long-term sovereign debt sustainability while preserving funds for critical infrastructure.

2. Flexible Inflation Targeting (FIT) Framework:

The Reserve Bank of India operates under a statutory Flexible Inflation Targeting (FIT) framework, maintaining Consumer Price Index (CPI) inflation within a target band of 4% (+/- 2%). While core inflation has demonstrated moderate stability, food price volatility—driven by supply-side shocks, climate disruptions, and global commodity fluctuations—frequently exerts upward pressure on headline inflation. Managing supply-side food shocks through targeted trade policies, strategic buffer stocks, and modernized storage infrastructure remains crucial to maintaining price stability without constraining monetary policy.

Green Energy Transition and Environmental Sustainability:

As one of the world's largest energy consumers, India faces the complex challenge of securing affordable, reliable energy for its expanding population while fulfilling international climate commitments under the Paris Agreement and achieving its net-zero emission target by 2070.

1. Renewable Energy Expansion and Panchamrit Goals:

At COP26, India committed to its 'Panchamrit' climate strategy, targeting 500 GW of non-fossil fuel energy capacity by 2030 and meeting 50% of its energy requirements from renewable sources. India has achieved significant expansion in utility-scale solar power installation, emerging as one of the world's lowest-cost solar energy producers. Initiatives like the National Green Hydrogen Mission and the PM-KUSUM scheme further underscore the structural commitement toward clean energy transition.

2. Grid Modernization and Coal Transition Dependencies:

Despite rapid progress in renewable energy capacity, thermal power generated from coal continues to provide the base-load power required for industrial activities and grid stability. Transitioning away from coal requires substantial grid-level energy storage systems (BESS), pump-storage hydropower, modern digital grid management, and significant international climate finance. Balancing energy security, affordability for lower-income households, and environmental sustainability remains a key policy priority.

Foreign Direct Investment (FDI) And Global Trade Realignments:

Global trade architectures are undergoing structural shifts, driven by geopolitical realignments, nearshoring trends, and a growing emphasis on supply chain security over pure cost optimization.

1. FDI Inflows and Sectoral Distribution:

India has consistently attracted elevated foreign direct investment (FDI) inflows, reflecting global investor confidence in its long-term growth fundamentals. However, the distribution of FDI remains concentrated in computer software, hardware, financial services, and telecom, with manufacturing receiving a smaller proportion. Policy efforts are focused on attracting greenfield FDI into high-value manufacturing, electronics, and green technologies.

2. Bilateral Free Trade Agreements (FTAs) and Global Value Chains:

In a strategic pivot from large multi-lateral trade frameworks like RCEP, India has actively pursued bilateral, high-impact Free Trade Agreements (FTAs) with key trade partners, including the UAE, Australia, the EFTA block, and ongoing negotiations with the UK and the European Union. These agreements are designed to secure market access for Indian service exports and labor-intensive manufactured products, while integrating domestic firms into global value chains.

Policy Recommendations and Strategic Roadmap For 'Viksit Bharat @2047':

To resolve contemporary economic challenges and fully leverage emerging trends, a synchronized multi-pillar policy roadmap is essential as India works toward its goal of becoming a developed nation ('Viksit Bharat') by 2047:

1. Comprehensive Agricultural Modernization: Accelerate investments in climate-resilient crop varieties, expand micro-irrigation networks, strengthen Farmer Producer Organizations (FPOs), and modernize rural logistics infrastructure to improve agricultural yields and protect rural livelihoods from climate impacts.

2. Deepening Industrial and Manufacturing Capability: Deepen the implementation of PLI schemes, lower logistics costs through PM Gati Shakti, streamline land and labor compliance frameworks, and foster domestic R&D to position India as a competitive global manufacturing hub.

3. Human Capital Accumulation and Labor Reforms: Align educational curricula with industry demands, expand apprenticeship programs, improve vocational training platforms, and institute comprehensive social safety frameworks for informal and gig-economy workers.

4. Fiscal-Monetary Alignment and Stability: Maintain a clear fiscal consolidation trajectory while protecting growth-enhancing public capital expenditures. Strengthen tax compliance through digital auditing and ensure efficient inflation management via targeted supply-side interventions.

5. Sustainable Energy and Climate Action: Expand grid-level energy storage solutions, incentivize domestic clean tech manufacturing, mobilize international green finance, and build climate-resilient municipal infrastructure.

Conclusion:

The Indian economy exhibits a compelling blend of structural strengths and unresolved socio-economic challenges. Its robust macroeconomic fundamentals, demographic potential, expanding digital public infrastructure, and progressive policy framework position the country for sustained long-term growth. However, realizing its full potential requires addressing core structural bottlenecks—such as agricultural productivity constraints, manufacturing sector growth deficits, informal labor markets, and climate risks.

By pursuing coordinated institutional reforms, expanding human capital investments, supporting technological innovation, and prioritizing sustainable development, India can successfully overcome its contemporary economic challenges. As the country navigates this transformative decade, building an inclusive, resilient, and competitive macroeconomic structure will remain essential to ensuring that the benefits of economic growth extend across all segments of society.

References:

1. Ahluwalia, M. S. (2019). Economic Reforms in India: Achievements and Future Agenda. Journal of Economic Perspectives, 33(3), 115-132.
2. Bhagwati, J., &Panagariya, A. (2013). Why Growth Matters: How Economic Growth in India Reduced Poverty and the Lessons for Other Developing Countries. PublicAffairs.
3. Government of India, Ministry of Finance. (2024). Economic Survey 2023-24. New Delhi: Economic Division, Department of Economic Affairs.
4. Government of India, NITI Aayog. (2023). Strategy for New India @ 75 and Vision for Viksit Bharat @ 2047. New Delhi.
5. Gulati, A., &Juneja, R. (2022). Transforming Indian Agriculture: Sustainable Solutions for Farmers and Climate Resilience. Indian Council for Research on International Economic Relations (ICRIER).
6. Panagariya, A. (2020). India Unlimited: Reclaiming the Lost Glory. HarperCollins India.
7. Rangarajan, C., & Srivastava, D. K. (2021). Fiscal Federalism and Macroeconomic Stability in India. Oxford University Press.
8. Reserve Bank of India. (2024). Report on Currency and Finance 2023-24: Revitalizing Manufacturing for Indian Economy. Mumbai: RBI.
9. Rodrik, D. (2016). Premature Deindustrialization. Journal of Economic Growth, 21(1), 1-33.
10. Subramanian, A., &Felman, J. (2021). India's Great Slowdown: What Happened? What's the Way Out? Center for International Development, Harvard University.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Digital Economy, Financial Inclusion and Technological Changes in Contemporary Indian Economy

Chinmayi R. Hegadal
Lecturer, Department of Commerce,
SJMV BAJSS Arts & Commerce College for Women, Ranebnnur-581115.
Corresponding Author – Chinmayi R. Hegadal

DOI - 10.5281/zenodo.23058467

Abstract:

The Indian economy is undergoing a significant structural transformation driven by digitalisation, financial inclusion and rapid technological change. Digital technologies have increasingly become an important component of economic activity through digital payments, mobile banking, e-commerce, digital public infrastructure, cloud computing, artificial intelligence and platform-based services. At the same time, financial inclusion initiatives have expanded access to bank accounts, payment services, insurance, pensions and government transfers among previously underserved populations.

This paper examines the relationship between the expansion of the digital economy, financial inclusion and technological transformation in contemporary India. The study is based mainly on secondary data obtained from government and institutional sources such as the Ministry of Electronics and Information Technology (MeitY), Reserve Bank of India (RBI), National Payments Corporation of India (NPCI), Department of Financial Services, Telecom Regulatory Authority of India (TRAI) and World Bank. The analysis indicates rapid expansion of digital economic activity and digital payments. India's digital economy was estimated at 11.74% of national income in 2022–23 and is projected by MeitY to reach around 20% of national income by 2030. UPI transactions have expanded dramatically, while PMJDY has brought 59.26 crore beneficiaries into basic banking accounts as of 9 September 2026.

The paper argues that technological change can strengthen financial inclusion and productivity, but digital exclusion, cyber risks, inadequate digital literacy, privacy concerns and unequal access to technology remain important challenges. The study concludes with policy directions for inclusive digital infrastructure, financial literacy, cybersecurity, responsible artificial intelligence and equitable access to digital services.

Keywords: Digital Economy, Financial Inclusion, UPI, Digital Payments, Financial Technology, Artificial Intelligence, Digital Public Infrastructure, India, Technological Change.

Introduction:

The contemporary Indian economy is characterised by rapid technological transformation. Digital technologies are no longer confined to the information technology sector; they increasingly influence banking, finance, trade, manufacturing, agriculture, education, healthcare, public administration and employment.India's digital transformation has been supported by a combination of public digital infrastructure, expanding telecommunications connectivity, financial inclusion programmes and private-sector innovation. Initiatives such as Digital India, Aadhaar, the PradhanMantri Jan-DhanYojana (PMJDY), Unified Payments Interface (UPI), Direct Benefit Transfer (DBT), Bharat Bill Payment System and Account Aggregator have contributed to the development of an increasingly interconnected digital economic ecosystem.

According to MeitY's*State of India's Digital Economy* estimates, India's digital economy accounted for 11.74% of national income in 2022–23, equivalent to approximately ₹31.64 lakh crore in GDP terms. The report projects that its share could

rise to around 20% of national income by 2030. The expansion of digital finance is particularly visible in India's payment ecosystem. NPCI data show that UPI recorded 22,346.80 million transactions worth ₹29,02,988.05 crore in April 2026, increasing to 24,508.96 million transactions worth ₹29,82,355.95 crore in August 2026.

Thus, digitalisation and financial inclusion are increasingly interconnected. Access to a bank account alone is insufficient for meaningful financial inclusion; individuals also require affordable connectivity, digital literacy, secure payment mechanisms and the ability to use formal financial services effectively.

Statement of the Problem:

India has made considerable progress in expanding access to digital and financial services. However, several challenges remain:

- Digital access is not uniform across rural and urban areas.
- Differences in income, education and digital literacy influence technology adoption.
- Access to a bank account does not necessarily imply active financial usage.
- Cyber fraud and digital financial risks are increasing concerns.
- Elderly persons and digitally inexperienced users may face difficulties in using digital financial services.
- Small enterprises may face barriers in adopting advanced digital technologies.
- Artificial intelligence and automation may alter existing employment structures.
- Data privacy and cybersecurity have become important dimensions of economic governance.
- The digital divide may create a new form of economic inequality.

Therefore, it is necessary to examine whether technological transformation is broadening economic opportunities and financial inclusion while also identifying the emerging risks.

Objectives of the Study:

The major objectives are:

1. To examine the growth and significance of the digital economy in contemporary India.
2. To analyse the expansion of financial inclusion through banking and digital financial services.
3. To examine the growth of UPI and digital payment systems.
4. To study the role of telecommunications and internet connectivity in digital transformation.
5. To analyse the emerging influence of artificial intelligence and other technologies on the Indian economy.
6. To identify the major challenges associated with digitalisation and financial inclusion.
7. To suggest policy measures for inclusive and sustainable digital economic development.

Research Methodology of the Study:

1. Nature of the Study:

The study is **descriptive and analytical** in nature.

2. Data Sources: The study uses secondary data collected from:

- Ministry of Electronics and Information Technology (MeitY)
- Reserve Bank of India (RBI)
- National Payments Corporation of India (NPCI)
- Department of Financial Services
- PradhanMantri Jan-DhanYojana
- Telecom Regulatory Authority of India (TRAI)
- World Bank
- Government of India Economic Survey

The study uses the latest available data relevant to each indicator. Because different official datasets have different reference periods, the years/months are explicitly identified rather than treated as a single common-period dataset.

3. Method of Analysis:

The study employs:

- Percentage analysis

- Trend analysis
- Comparative analysis
- Descriptive statistical analysis
- Tabular presentation
- Graphical presentation

4. Conceptual Framework:

The relationship between technology and economic development can be represented as:

Digital Infrastructure
↓
Internet + Mobile Connectivity
↓
Digital Identity and Digital Public Infrastructure
↓
Bank Account Access
↓
Digital Financial Services
↓
Digital Payments / UPI / Mobile Banking
↓
Financial Inclusion
↓
Greater Market Participation
↓
Productivity, Employment and Economic Growth

This framework also indicates that financial inclusion increasingly depends on both financial infrastructure and digital capability.

Growth of India's Digital Economy:

India's digital economy has expanded beyond conventional IT and telecommunications. According to MeitY, the digital economy contributed 11.74% of national income in 2022–23, with an estimated GDP value of ₹31.64 lakh crore.

Table 1. Major Indicators of India's Digital Economy

Indicator	Value
Digital economy share of national income, 2022–23	11.74%
Digital economy GDP, 2022–23	₹31.64 lakh crore
Digital economy GVA, 2022–23	₹28.94 lakh crore
Digital-enabling industries' share of GVA	7.83%
New digital industries' contribution	Nearly 2%
Digital components of BFSI, trade and education	About 2%
Digital-economy employment, 2022–23	14.67 million
Share of workforce	2.55%
Projected digital-economy share by 2030	Around 20%

Source: MeitY, *State of India's Digital Economy* estimates.

The table highlights the growing importance of the digital economy in India's overall economic structure. In 2022–23, the digital economy accounted for 11.74% of national income, with an estimated GDP contribution of ₹31.64 lakh crore and GVA of ₹28.94 lakh crore. This indicates that digital activities have moved beyond the conventional information technology sector and have become an important component of India's broader economic activity.The contribution of digital-enabling industries was 7.83% of GVA, showing that sectors such as information technology, telecommunications and digital infrastructure provide a substantial foundation for digital economic activities. In addition, new digital industries contributed nearly 2%, reflecting the emergence of newer technology-driven activities, business models and services.

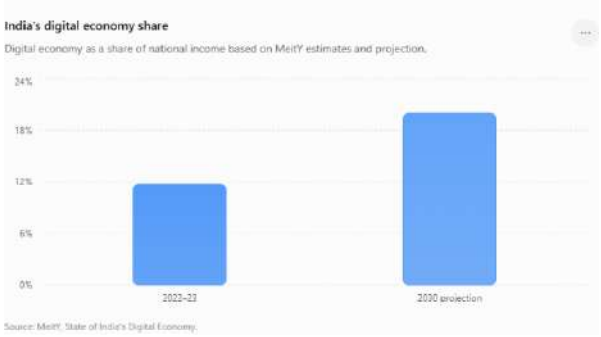
The table also shows that digital components within banking, financial services and insurance (BFSI), trade and education contributed about 2%. This demonstrates the increasing integration of digital technologies into traditional

sectors. Digital banking, online commerce, digital learning and technology-enabled financial services are therefore becoming important parts of India's economic transformation.

The employment figures indicate that the digital economy provided approximately 14.67 million jobs in 2022–23, representing 2.55% of the total workforce. Although the employment share is relatively smaller than the digital economy's contribution to national income, this suggests relatively high productivity in several digitally intensive activities. At the same time, the changing nature of technology is creating demand for specialised skills in areas such as software development, data analytics, artificial intelligence, cybersecurity, cloud computing and digital services.The projected increase in the digital economy's share to around 20% of national income by 2030 indicates the expected continued expansion of digitalisation. If realised, this would represent a substantial structural change in the Indian economy. However, the projection should be understood as an estimate rather than an observed outcome.

Overall, the table demonstrates that digitalisation is becoming a major driver of India's economic transformation. The expansion of digital infrastructure, financial technology, e-commerce, digital public services and emerging technologies can contribute to productivity and new employment opportunities. At the same time, the relatively limited employment share highlights the importance of digital skills, reskilling, digital inclusion, cybersecurity and equitable access to technology so that the benefits of digital economic growth are more widely distributed.

Figure 1. India's Digital Economy as a Share of National Income



India's digital economy share Digital economy as a share of national income based on MeitY estimates and projection. The increase from 11.74% to a projected around 20% illustrates the expected deepening of digitalisation across the Indian economy. The 2030 figure is a projection, not an observed outcome.

1. Digital Payments and UPI:

The Unified Payments Interface has become one of the most important components of India's digital financial infrastructure.

Table 2. UPI Transactions: April–August 2026

Month	Transaction Volume (million)	Transaction Value (₹ crore)
April 2026	22,346.80	29,02,988.05
May 2026	23,201.93	29,90,424.21
June 2026	22,716.07	28,92,138.67
July 2026	23,658.35	29,87,880.49
August 2026	24,508.96	29,82,355.95

Source: NPCI, UPI Product Statistics.

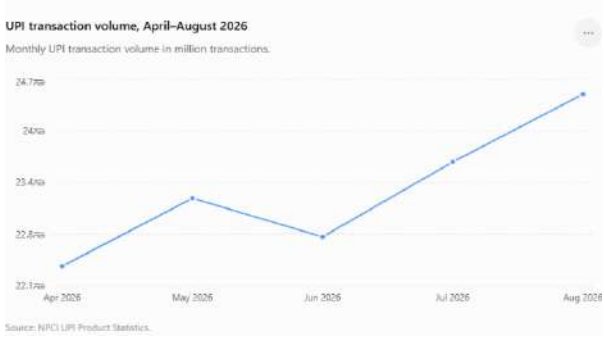
The table presents the monthly growth pattern of Unified Payments Interface (UPI) transactions in India from April to August 2026. The data indicate that UPI has become a major component of India's digital payment ecosystem, with transaction volumes consistently exceeding 22 billion transactions per month during the period.

The transaction volume increased from 22,346.80 million in April 2026 to 24,508.96 million in

August 2026, representing an increase of approximately 9.67% over the five-month period. Although there was a temporary decline in June, when transaction volume fell to 22,716.07 million, the volume recovered in July and reached the highest level of 24,508.96 million in August.

In terms of transaction value, UPI transactions were valued at ₹29,02,988.05crore in April 2026. The value increased to its highest level of ₹29,90,424.21crore in May 2026. It subsequently declined to ₹28,92,138.67crore in June, before recovering to ₹29,87,880.49 crore in July. In August, transaction value stood at ₹29,82,355.95crore. Thus, despite month-to-month fluctuations, the value remained close to ₹29 lakh crore throughout the period.

Figure 2. Growth of UPI Transaction Volume



UPI volume increased from 22.35 billion transactions in April 2026 to 24.51 billion in August 2026, an increase of approximately 9.7% over the five-month period. The data indicate the continuing scale of digital payment adoption.

3. Financial Inclusion in India:

Financial inclusion refers to the availability and effective use of affordable financial services by individuals and enterprises. India's PMJDY has played an important role in expanding formal banking access.

As of 9 September 2026, PMJDY had 59.26 crore beneficiaries, including 46.07 crore beneficiaries at rural/semi-urban branches and 13.19 crore at urban/metro branches. The programme reported deposits of approximately ₹3,17,414.45crore and 41.45 crore RuPay cards.

Table 3. PMJDY Progress as on 9 September 2026:

Indicator	Number
Total beneficiaries	59.26 crore
Rural/Semi-urban beneficiaries	46.07 crore
Urban/Metro beneficiaries	13.19 crore
Female beneficiaries	33.02 crore
Deposits	₹3,17,414.45 crore
RuPay cards issued	41.45 crore

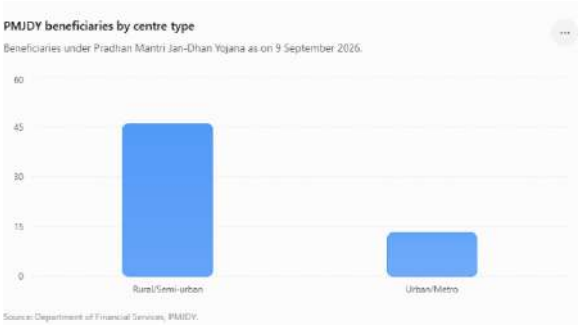
Source: Department of Financial Services, PMJDY.

The table presents the progress of the PradhanMantri Jan-DhanYojana (PMJDY) in expanding access to formal banking services in India. The figures indicate that financial inclusion has reached a very large population through basic bank accounts, deposits and RuPay debit cards.The total number of PMJDY beneficiaries is 59.26 crore, indicating the extensive reach of formal banking services. Of these, 46.07 crore beneficiaries belong to rural and semi-urban areas, while 13.19 crore are from urban and metropolitan areas. Rural and semi-urban beneficiaries therefore account for approximately 77.7% of the total, compared with about 22.3% in urban and metropolitan areas. This distribution highlights the importance of PMJDY in extending banking access beyond major urban centres. The participation of women is also significant. The scheme records 33.02 crore female beneficiaries, which represents approximately 55.7% of total beneficiaries. This indicates substantial participation of women in formal banking and is particularly relevant to the objective of improving women's economic and financial participation.

The deposits mobilised through PMJDY accounts amount to approximately ₹3,17,414.45crore. This indicates that these accounts are not merely instruments for opening bank accounts but also constitute a significant channel for mobilising household financial resources within the formal banking system.The issuance of 41.45 croreRuPay cards further demonstrates the integration of basic banking access

with digital payment infrastructure. RuPay cards can facilitate electronic transactions and provide beneficiaries with an additional mechanism for accessing formal financial services.

Figure 3. PMJDY Beneficiaries by Centre Type:



Source: Department of Financial Services, PMJDY.

The predominance of rural and semi-urban beneficiaries demonstrates the importance of financial inclusion programmes in extending formal banking access beyond major urban centres.

4. Digital Financial Inclusion:

Digital financial inclusion combines financial access with technological access.The World Bank's 2025 Global Findex data for India show that 45.2% of the surveyed population reported using the internet in the previous seven days, while 54.7% reported not doing so in the survey indicator. The Findexmicrodata also show that among respondents with an account, 41.7% reported checking their account balance through a mobile phone or computer in the previous 12 months.

Table 4. Selected Digital-Financial Indicators: India, 2024.

Indicator	Reported share
Used internet in previous 7 days	45.2%
Did not use internet in previous 7 days	54.7%
Account holders checking balance digitally	41.7%
Respondents saving through bank account	26.0%
Domestic remittances using an account	13.6%

Source: World Bank, Global Findex Database 2025, India 2024.

The data indicates **relatively low levels of digital financial engagement** among respondents. Only **45.2%** used the internet during the previous seven days, while **54.7%** did not, suggesting a significant digital-access gap. Digital account balance checking was reported by **41.7%**, showing moderate use of digital banking services. However, only **26.0%** reported saving through a bank account and just **13.6%** used bank accounts for domestic remittances. Overall, the findings suggest that **basic access to digital services has not yet translated into widespread use of formal banking and digital financial services**. This highlights the need for greater digital literacy, awareness of banking services, and accessible financial inclusion initiatives.

5. Telecommunications and Digital Connectivity:

Digital economic participation depends heavily on connectivity. TRAI reported that India's broadband subscriber base crossed 1 billion in November 2025, compared with 131.49 million in November 2015. Thus, the broadband subscriber base had increased more than six-fold over that decade. For March 2025, TRAI reported 969.10 million internet subscribers, of which 927.70 million were wireless and 41.41 million were wired subscribers.

Table 5. Internet Connectivity Indicators

Indicator	Value
Internet subscribers, March 2025	969.10 million
Wireless internet subscribers	927.70 million
Wired internet subscribers	41.41 million
Broadband subscribers, March 2025	944.12 million
Broadband subscribers, November 2025	1.0037 billion

Source: TRAI.

The above table data highlights the rapid expansion of internet connectivity in India. In March 2025, total internet subscribers reached 969.10 million, of which 927.70 million (about

95.7%) were wireless users, indicating the dominant role of mobile connectivity. Wired subscribers accounted for only 41.41 million.

Broadband connectivity was also substantial, with 944.12 million subscribers in March 2025, increasing to 1.0037 billion by November 2025. This represents an increase of approximately 59.58 million subscribers (6.3%). Overall, the figures indicate continued digital infrastructure expansion and growing broadband adoption, although internet access remains heavily dependent on wireless/mobile networks.

Figure 4. Broadband Expansion in India



The rapid increase in connectivity has created the infrastructure necessary for digital payments, online education, e-commerce, telemedicine, digital governance and other technology-enabled economic activities.

6. Technology and Transformation of the Banking Sector:

Technological change has transformed banking from branch-based service delivery to a multi-channel ecosystem.

Major technological developments include:

- Internet banking
- Mobile banking
- UPI
- QR-code payments
- Aadhaar-enabled payment services
- RuPay
- Digital KYC
- Electronic fund transfers
- Account Aggregator
- Artificial intelligence-based customer services
- Cloud computing
- Data analytics
- Biometric authentication

The RBI's National Strategy for Financial Inclusion emphasises the importance of digital financial inclusion while also identifying the need for greater digital awareness, access points, acceptance infrastructure, privacy and customer protection.

Thus, technology can reduce transaction costs and increase convenience, but digital financial inclusion requires more than technological availability. Users must also possess the knowledge and confidence to use digital services safely.

7. Artificial Intelligence and Emerging Technologies:

Artificial Intelligence is becoming an important component of India's technological transformation.

AI is increasingly relevant to:

- Banking and financial services
- Credit assessment
- Fraud detection
- Customer service
- Agriculture
- Healthcare
- Education
- Logistics
- Manufacturing
- Public administration
- Cybersecurity
- Business analytics

The Economic Survey 2025–26 identifies technology and innovation as important elements of India's economic transformation.

However, AI can also create structural changes in employment. Routine and repetitive tasks may increasingly be automated, while demand may rise for analytical, technological, creative and interpersonal skills.

Therefore, the economic impact of AI should be examined through both productivity enhancement and labour-market adjustment.

8. Digital Economy and Employment:

The digital economy has generated new categories of employment, including:

- Software development
- Data analysis
- Digital marketing
- FinTech services
- E-commerce
- Platform work
- App-based services
- Cybersecurity
- Cloud computing
- AI-related occupations
- Digital content creation

MeitY estimated digital-economy employment at 14.67 million workers in 2022–23, representing approximately 2.55% of the workforce. The same assessment indicated substantially higher productivity in the digital economy than in the rest of the economy.

At the same time, digitalisation can affect traditional employment through automation and restructuring. Consequently, skill development and reskilling become important components of digital economic policy.

Major Challenges of Digital Economy and Financial Inclusion in India:

- **Digital Divide:** Unequal access to smartphones, computers, broadband and reliable internet, particularly between rural and urban areas.
- **Digital Literacy Gap:** Limited knowledge and skills among sections of the population restrict effective use of digital financial services.
- **Cybersecurity Threats:** Increasing digital transactions create risks related to phishing, hacking, identity theft, malware and online financial fraud.
- **Digital Financial Fraud:** First-time and less digitally experienced users may be vulnerable to fraudulent calls, messages, links and unauthorised transactions.
- **Gender-Based Digital Gap:** Differences in access to devices, connectivity, affordability and digital skills can limit women's participation in the digital economy.
- **Rural Connectivity Constraints:** Poor network quality, inadequate digital infrastructure and limited service availability can restrict digital participation in rural and remote areas.
- **Affordability of Technology:** The cost of smartphones, internet services, software and digital devices can remain a barrier for low-income households and small enterprises.
- **Privacy and Data Protection:** The growing collection and processing of personal and financial data creates concerns regarding privacy, consent and responsible data use.
- **Employment Displacement:** Automation, artificial intelligence and digital technologies may reduce demand for certain routine and repetitive occupations.
- **Skill Mismatch:** Rapid technological change can create a gap between existing workforce skills and the skills required by emerging digital industries.
- **Limited Digital Awareness among Vulnerable Groups:** Elderly persons, persons with disabilities and digitally inexperienced users may face difficulties in accessing technology-enabled services.
- **MSME Digital Adoption:** Small businesses may face financial, technical and skill-related barriers in adopting e-commerce, digital accounting, cloud services and advanced technologies.
- **Language and Accessibility Barriers:** Limited availability of digital services in regional languages and accessible formats can restrict wider adoption.
- **Dependence on Digital Infrastructure:** Network failures, power interruptions and technical disruptions can affect access to digital financial and public services.

- **Trust Deficit:** Concerns about fraud, privacy and transaction failures can discourage some individuals from adopting digital financial services.
- **Unequal Distribution of Benefits:** Highly skilled workers and technologically advanced enterprises may benefit more rapidly from digitalisation than low-skilled workers and smaller firms.
- **Regulatory Challenges:** Rapid technological innovation requires continuous adaptation of regulations relating to FinTech, AI, cybersecurity, data protection and digital markets.
- **Responsible AI Governance:** The increasing use of AI requires attention to transparency, accountability, bias, privacy and human oversight.
- **Consumer Protection:** Effective grievance-redressal mechanisms are necessary to protect users from unauthorised transactions, misleading digital services and technology-related financial losses.
- **Sustainability and E-Waste:** Rapid growth in digital devices increases the need for responsible electronic-waste management and environmentally sustainable technology practices.

Major Findings of the Study:

- Rapid expansion of the digital economy: India's digital economy accounted for 11.74% of national income in 2022–23, demonstrating its increasing importance in overall economic activity.
- Significant economic contribution: The digital economy contributed approximately ₹31.64 lakh crore to GDP and ₹28.94 lakh crore to GVA in 2022–23.
- Strong future growth potential: The digital economy's share is projected to reach around 20% of national income by 2030, indicating continued digital transformation.
- Expansion of digital employment: The digital economy generated approximately 14.67 million jobs in 2022–23, accounting for about 2.55% of the workforce.
- Rapid growth of UPI: UPI transaction volume increased from 22,346.80 million in April 2026 to 24,508.96 million in August 2026, reflecting sustained adoption of digital payments.
- Large-scale digital payment value: UPI transactions remained close to ₹29 lakh crore per month during April–August 2026, highlighting the economic significance of digital payment infrastructure.
- Expansion of financial inclusion: PMJDY reached 59.26 crore beneficiaries, providing a major foundation for formal financial inclusion.
- Strong rural and semi-urban coverage: 46.07 crore PMJDY beneficiaries were from rural and semi-urban areas, accounting for approximately 77.7% of total beneficiaries.
- Significant female participation: 33.02 crore female beneficiaries were covered under PMJDY, representing approximately 55.7% of total beneficiaries.
- Growth in formal financial savings: PMJDY accounts collectively recorded approximately ₹3,17,414.45crore in deposits, indicating substantial mobilisation of financial resources.
- Integration of banking with digital payments: The issuance of 41.45 croreRuPay cards demonstrates the growing connection between basic bank-account access and digital financial services.
- Rapid expansion of digital connectivity: India's broadband subscriber base crossed one billion in November 2025, creating a broad infrastructure base for digital economic participation.
- Technology is transforming traditional sectors: Digital technologies are increasingly integrated into banking, financial services,

trade, education, healthcare, agriculture and public administration.

- Artificial intelligence is creating new opportunities: AI, data analytics, cloud computing and automation are generating opportunities for productivity improvement and new technology-oriented occupations.
- Changing employment structure: Technological advancement is simultaneously creating new employment opportunities and increasing the need for reskilling and upskilling because of automation.
- Digital literacy remains important: Access to bank accounts and digital infrastructure does not automatically ensure effective financial inclusion; users require adequate digital and financial knowledge.
- Cybersecurity has become a major concern: The expansion of digital transactions increases the importance of cybersecurity, fraud prevention, consumer awareness and secure authentication.
- Digital inclusion requires more than connectivity: Affordable devices, reliable internet, digital skills, accessible interfaces and consumer protection are necessary for meaningful participation in the digital economy.
- MSMEs are important beneficiaries and adopters: Digital payments, e-commerce, digital accounting and FinTech services can improve the efficiency and market access of small enterprises.
- Inclusive technological development is essential: The long-term benefits of India's digital transformation depend on reducing the digital divide and ensuring that rural households, women, low-income groups, small businesses and other digitally vulnerable sections can participate effectively.

Overall Finding:

The study finds that digitalisation, financial inclusion and technological innovation are increasingly interconnected drivers of India's contemporary economic transformation. However, achieving inclusive and sustainable digital growth requires simultaneous investment in digital infrastructure, financial and digital literacy, cybersecurity, skill development, data protection and equitable access to technology.

Policy Implications of the Study:

The findings of the study have several important policy implications for strengthening India's digital economy, financial inclusion and technological development:

- **Strengthening Digital Infrastructure:** Government should continue expanding affordable, reliable and high-speed broadband connectivity, particularly in rural, remote and economically disadvantaged areas.
- **Promoting Digital Financial Inclusion:** Financial inclusion policies should move beyond bank-account ownership and encourage regular and effective use of digital banking, UPI, insurance, pension and credit services.
- **Enhancing Digital Literacy:** Large-scale digital and financial literacy programmes should be implemented, particularly for rural households, women, senior citizens, low-income groups and first-time digital users.
- **Improving Cybersecurity:** Stronger cybersecurity systems, real-time fraud detection and rapid grievance-redressal mechanisms should be developed to protect digital payment users.
- **Strengthening Consumer Protection:** Digital financial consumers should receive clear information about transaction risks, charges, privacy practices and mechanisms for reporting unauthorised transactions.
- **Promoting Women's Digital Inclusion:** Policies should improve women's access to smartphones, internet connectivity, digital financial accounts and technology-related

skills to strengthen their economic participation.

- **Supporting Rural Digital Transformation:** Digital infrastructure and service centres should be expanded in rural areas to enable greater participation in e-commerce, digital banking, online education, telemedicine and government services.
- **Developing Digital Skills:** Educational institutions and skill-development agencies should provide training in artificial intelligence, data analytics, cybersecurity, cloud computing, digital accounting and other emerging technologies.
- **Reskilling and Upskilling Workers:** As automation and AI transform employment, continuous training programmes should help workers transition into emerging occupations and reduce technology-related employment displacement.
- **Promoting MSME Digitalisation:** Small and medium enterprises should receive technical support, affordable financing and training to adopt digital payments, e-commerce, digital accounting, cloud technologies and AI-enabled business solutions.
- **Encouraging Responsible Artificial Intelligence:** AI adoption should be accompanied by appropriate standards relating to transparency, accountability, privacy, security and human oversight.
- **Strengthening Data Protection:** Effective implementation of data-governance and privacy frameworks is necessary to protect individuals' personal and financial information in the digital economy.
- **Promoting Regional-Language Technology:** Digital financial and government services should increasingly be available in Indian languages with simple and accessible interfaces.
- **Improving Digital Public Infrastructure:** Continued development and interoperability of digital public infrastructure can reduce transaction costs and improve access to public and private services.
- **Bridging the Digital Gender and Rural Divide:** Policy interventions should specifically identify groups that remain digitally excluded and provide targeted support in terms of connectivity, devices, skills and financial access.
- **Strengthening FinTech Regulation:** Regulatory frameworks should encourage innovation while maintaining financial stability, consumer protection, cybersecurity and responsible lending practices.
- **Promoting Digital Entrepreneurship:** Start-ups and young entrepreneurs should be encouraged through incubation, digital-skills programmes, access to finance and technology-support mechanisms.
- **Ensuring Accessibility:** Digital platforms should be designed to accommodate elderly persons, persons with disabilities and users with limited technological experience.
- **Developing Sustainable Digital Infrastructure:** Policies should encourage energy-efficient technologies, responsible e-waste management and environmentally sustainable digital infrastructure.
- **Strengthening Institutional Coordination:** Coordination among the RBI, financial institutions, technology agencies, telecom authorities, educational institutions and state governments is necessary for effective implementation of digital-inclusion policies.

Concluding Remark:

India's contemporary economic transformation is increasingly shaped by the interaction of digitalisation, financial inclusion and technological innovation. The expansion of the digital economy, UPI, PMJDY and broadband connectivity demonstrates the scale of this transformation. The evidence indicates that digital technology is facilitating access to financial

services, reducing transaction frictions and creating new economic opportunities. India's digital economy already represents a significant share of national income, while digital payments and financial accounts have expanded to unprecedented levels.

However, technological progress does not automatically ensure inclusive development. Digital exclusion, inadequate digital literacy, cyber security threats, privacy concerns and labour-market disruption remain important challenges. Consequently, India's next phase of digital development needs to focus not merely on access to technology, but on meaningful, safe, affordable and productive use of technology.

The future direction of India's digital economy will therefore depend on the ability to combine technological innovation with human capital development, consumer protection, financial literacy, inclusive infrastructure and effective institutional governance.

References:

1. International Monetary Fund. (2023). Digital financial services and inclusion in India. In *Digital solutions for financial inclusion* (pp. 142–168). IMF eLibrary. imf.org
2. Sharma, A., &Verma, P. (2025). Digital transformation and economic growth in India: An empirical study on high-tech exports and infrastructure. *ResearchGate Empirical Studies*, 12(3), 45–62. researchgate.net
3. Singh, K. (2025). Digital economy and financial inclusion: Tracking India's Financial Inclusion Index from 2017 to 2025. *Indian Journal of Political Science (IJPS)*, 86(1), 112–128. ijps.in
4. Reddy, Y. K., & Mishra, B. (2024). *The new Digital India: Technology, transformation, and tomorrow's economy*. Books on Web Publications.
5. Sarkar, S. (2022). *FinTech innovation and financial inclusion*. New Century Publications.
6. Sharma, R. K. (2023). *Digital banking & financial inclusion in India: A contemporary overview*. Kindle Academic Editions.
7. Indian Council for Research on International Economic Relations. (2026). *State of India digital economy report 2026*. ICRIER. icrier.org
8. Ministry of Electronics and Information Technology. (2025, January 23). *Estimation and measurement of India's digital economy*. Vision IAS Current Affairs Summary. visionias.in
9. Press Information Bureau. (2026). *The Digital India initiative: Transforming the contemporary Indian economy*. Ministry of Electronics and Information Technology, Government of India. pib.gov.in

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Impact of Urbanisation on Rural Communities: Challenges, Opportunities and The Path Towards Sustainable Development

Shri. M. C. Hadimani
Lecturer, Department of Economics,
K.L.E. Society's S.V.S. Bellubbi Arts and Commerce College, Saundatti.
Corresponding Author – Shri. M. C. Hadimani
DOI - 10.5281/zenodo.23058487

Abstract:

Urbanization is one of the major socio-economic transformations taking place in India. The expansion of towns and cities has significantly influenced rural communities through changes in employment, migration, agriculture, markets, infrastructure, technology and lifestyles. Urbanization provides rural people with better access to employment, education, healthcare, transportation, markets and digital services. At the same time, rapid and unplanned urban expansion creates several challenges, including agricultural land conversion, rural–urban migration, and environmental degradation, pressure on natural resources, unemployment and social inequality. This paper examines the impact of urbanization on rural communities and discusses its challenges and opportunities from the perspective of sustainable development. The study is based entirely on secondary data collected from sources such as the Census of India, Government of India reports, NITI Aayog, World Bank publications and relevant research studies. The study finds that urbanisation cannot be viewed only as a process of population movement from villages to cities; it also creates strong economic and social connections between rural and urban areas. Balanced regional development, rural employment generation, improved infrastructure, digital connectivity, protection of agricultural land and sustainable use of natural resources are essential for reducing the negative effects of urbanisation. A coordinated rural–urban development approach can contribute to inclusive and sustainable development in India.

Keywords: Urbanisation, Rural Communities, Migration, Sustainable Development, Agriculture, Rural Development, Rural–Urban Transformation.

Introduction:

Urbanisation refers to the growth of towns and cities and the increasing concentration of population and economic activities in urban areas. It is accompanied by changes in employment, consumption, infrastructure, technology, social relations and lifestyles. In India, urbanisation has increasingly influenced rural communities through migration, expansion of markets, improved transportation, communication and greater interaction between villages and towns.

According to the Census of India 2011, India had a total population of about 1,210.2 million. Of this, approximately 833.1 million people, or 68.8%, lived in rural areas, while 377.1 million, or 31.2%, lived in urban areas. These figures demonstrate the continued importance of rural communities in India's demographic and economic structure.

Urbanisation creates several opportunities for rural populations. Better roads and transport connect villages with urban markets, while educational institutions, healthcare facilities, banking services and digital technologies have become more accessible. Rural producers can reach wider markets, and young people can access new employment opportunities.

However, rapid urban expansion also creates challenges. Agricultural land may be converted for residential, industrial and commercial

purposes. Migration of young workers can affect the rural labour force and traditional occupations. Increasing demand for water, land and other resources can create environmental pressure. Therefore, the relationship between urbanisation and rural development requires careful planning.

Objectives of the Study:

The major objectives of the study are:

1. To examine the impact of urbanisation on rural communities in India.
2. To identify the major economic, social and environmental challenges created by urbanisation.
3. To examine the opportunities created by rural–urban linkages.
4. To suggest measures for achieving balanced and sustainable rural–urban development.

Research Methodology:

The study is **descriptive and analytical** in nature and is based entirely on secondary data. No primary field survey was conducted. Information has been collected from the Census of India, Government of India reports, NITI Aayog publications, World Bank reports and relevant books, journals and research studies. The collected information has been analysed qualitatively to understand the relationship between urbanisation and rural communities.

Rural–Urban Population Distribution:

The Census of India 2011 provides the following population distribution:

Population Category	**Population**	**Percentage**
Rural Population	833.1 million	68.8%
Urban Population	377.1 million	31.2%
Total Population	**1,210.2 million**	**100%**

Source: Census of India, 2011

The figures indicate that a large proportion of India's population continues to live in rural areas. Therefore, urbanisation policies must consider the economic and social well-being of rural communities rather than focusing exclusively on cities.

Impact of Urbanisation on Rural Communities:

1. Economic Impact:

Urbanisation has strengthened economic connections between villages and cities. Rural producers increasingly depend on urban markets for selling agricultural products, vegetables, dairy products, handicrafts and other goods. Improved transport and communication have reduced the physical distance between rural producers and urban consumers.

Urban areas also provide employment opportunities for rural workers. Migration to towns and cities enables many rural households to diversify their sources of income. Remittances sent by migrant workers can contribute to household expenditure, education, housing and other investments.

However, excessive dependence on urban employment can create economic insecurity. Informal employment, low wages and uncertain working conditions may affect migrant workers. Therefore, employment opportunities should also be strengthened within rural areas.

2. Impact on Agriculture:

Urbanisation creates new markets for agricultural products and increases demand for food, milk, vegetables and other rural products. Farmers located near urban centres may benefit from better market access and improved prices.

At the same time, urban expansion can reduce agricultural land. Land may be converted for housing, roads, industries, commercial establishments and other infrastructure. This can reduce the area available for cultivation and may affect agricultural livelihoods.

Sustainable land-use planning is therefore necessary to balance urban growth with agricultural production and food security.

3. Migration and Employment:

Rural–urban migration is an important consequence of urbanisation. Young people often migrate in search of employment, higher wages, education and better living conditions. Migration can provide additional income to rural households.

However, continuous migration of young people may reduce the availability of labour in agriculture and traditional occupations. It can also contribute to changes in the demographic structure of villages.

Creating employment through rural industries, small enterprises, agro-processing, tourism, skill development and digital services can reduce excessive dependence on migration.

4. Social and Cultural Changes:

Urbanisation influences rural lifestyles, consumption patterns, family structures and social relationships. Greater exposure to urban culture, education, mass media and digital technology has contributed to changes in attitudes and aspirations among rural youth.

These changes can have positive effects, including greater awareness of education, gender equality, employment opportunities and modern technologies. However, traditional occupations, local practices and cultural institutions may gradually decline.

Development policies should therefore encourage modernisation while also preserving valuable local traditions and cultural heritage.

5. Infrastructure and Technology:

Urbanisation has encouraged improvements in roads, transportation, electricity, telecommunications, banking and digital services. Mobile phones and internet connectivity have provided rural communities with access to information, online education, digital payments and government services.

Digital technology can reduce the rural–urban divide by connecting rural people with markets, educational resources and employment opportunities. However, unequal access to internet services, devices and digital skills remains a challenge.

6. Environmental Impact:

Rapid urbanisation increases demand for land, water, energy and other natural resources. Unplanned development may result in waste generation, water pollution, loss of vegetation and pressure on local ecosystems.

Rural areas located near expanding towns may experience changes in land use and increasing environmental pressure. Sustainable urban planning, waste management, water conservation and protection of agricultural and ecological resources are therefore essential.

Major Findings:

The major findings of the study are:

1. Urbanisation has created stronger economic and social linkages between rural and urban areas.
2. Rural communities benefit from improved access to markets, education, healthcare, transport and technology.
3. Rural–urban migration provides employment and income opportunities but may reduce the availability of young labour in villages.
4. Urban expansion can lead to conversion of agricultural land and pressure on rural natural resources.
5. Digital technology has significant potential to reduce the rural–urban development gap.
6. Unplanned urbanisation can increase environmental problems and social inequalities.
7. Sustainable development requires coordinated planning of both rural and urban areas.

Suggestions:

The following measures can help achieve balanced and sustainable rural–urban development:

1. **Strengthen rural employment:** Promote agro-based industries, small-scale industries,

rural enterprises and local employment opportunities.

2. **Protect agricultural land:** Implement appropriate land-use planning to prevent unnecessary conversion of productive agricultural land.
3. **Improve rural infrastructure:** Develop roads, transportation, electricity, healthcare, education, sanitation and communication facilities.
4. **Promote digital connectivity:** Expand affordable internet services and digital literacy programmes in rural areas.
5. **Develop skills:** Provide vocational education and skill development programmes based on local employment opportunities.
6. **Support sustainable agriculture:** Encourage water conservation, efficient resource use and environmentally sustainable farming practices.
7. **Strengthen rural–urban linkages:** Improve transportation and market facilities so that rural producers can access urban markets effectively.
8. **Protect the environment:** Promote waste management, water conservation, afforestation and sustainable land-use practices.
9. **Encourage decentralised development:** Develop small towns and rural growth centres to reduce excessive concentration of economic activities in large cities.
10. **Promote inclusive development:** Ensure that women, youth, small farmers and economically weaker sections benefit from development opportunities.

Conclusion:

Urbanisation has brought both opportunities and challenges to rural communities. It has improved access to employment, markets, infrastructure, education and technology, but it has also created problems such as agricultural land loss, migration and environmental pressure. Sustainable rural–urban development requires balanced planning, rural employment, better infrastructure, digital connectivity and protection of natural resources. A strong partnership between rural and urban areas can promote inclusive and sustainable development in India.

References:

1. Census of India. (2011). *Census of India 2011: Provisional Population Totals*. Government of India, New Delhi.
2. Government of India. (Various years). *Economic Survey of India*. Ministry of Finance, New Delhi.
3. NITI Aayog. (Various years). *Reports on Sustainable Development and Rural Development*. Government of India, New Delhi.
4. World Bank. (Various years). *India: Urbanisation and Development Reports*. World Bank.
5. Ministry of Rural Development. (Various years). *Annual Reports*. Government of India, New Delhi.
6. United Nations. (2018). *World Urbanization Prospects: The 2018 Revision*. United Nations, New York.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Rethinking the Indian Past: Changing Approaches to History and Historiography

Dr. Nagaraja V.
Assistant Professor, Department of History,
KLE'S S. Nijalingappa College, Rajajinagar, Bengaluru, Karnataka, India
Corresponding Author – Dr. Nagaraja V.
DOI - 10.5281/zenodo.23058506

Abstract:

The writing of Indian history has undergone significant transformations from the colonial period to the present. Historical interpretations of India have been shaped by changing intellectual, political, social, and cultural contexts. Colonial historians frequently interpreted Indian society through Eurocentric categories, presenting British rule as a civilizing and modernizing force. In response, nationalist historians sought to recover India's historical agency and construct an alternative narrative centered on Indian civilization, cultural continuity, and the struggle for independence. Marxist historians subsequently emphasized class relations, economic structures, agrarian systems, and material conditions, while the Subaltern Studies collective challenged elite-centered interpretations by bringing peasants, workers, tribal communities, and other marginalized groups into historical analysis. Later developments in feminist, Dalit, postcolonial, environmental, cultural, and global historiography further expanded the scope of Indian history. This article examines these changing approaches and argues that rethinking the Indian past requires moving beyond a single, authoritative historical narrative. It suggests that Indian historiography should incorporate multiple voices, diverse sources, regional experiences, and interdisciplinary approaches while maintaining critical engagement with evidence. Such an approach can make the study of Indian history more inclusive, nuanced, and relevant to contemporary society.

Keywords: Indian History, Historiography, Colonialism, Nationalism, Marxist Historiography, Subaltern Studies, Post Colonialism, Gender, Historical Interpretation.

Introduction:

History is not simply a record of events that occurred in the past; it is also an intellectual process through which societies interpret, organize, and give meaning to their past. Historical knowledge is influenced by the questions historians ask, the sources they select, the theoretical frameworks they employ, and the social contexts in which they write. Consequently, interpretations of the Indian past have changed considerably over time. Indian historiography has experienced several major intellectual shifts. Colonial historians interpreted Indian society largely through European categories and often portrayed India as static, divided, irrational, and incapable of political modernization without British intervention. Nationalist historians challenged many of these assumptions and attempted to restore historical agency to Indians. Later, Marxist historians shifted attention toward economic structures, class relations, agrarian systems, and material conditions. Subaltern Studies subsequently questioned elite-cantered narratives and sought to recover the experiences and political agency of groups that had been marginalized in conventional historical writing. Contemporary historiography has become increasingly diverse. Gender history, Dalit history, environmental history, cultural history, oral history,

microhistory, and global history have expanded the subjects and methodologies of historical research. The availability of digital archives and new forms of historical evidence has further changed the ways in which historians investigate the past. The purpose of this article is to examine the major changes in approaches to Indian history and historiography and to explore why the Indian past needs to be continually reinterpreted. It argues that rethinking history does not mean rejecting earlier scholarship altogether. Rather, it involves critically examining existing interpretations, identifying their limitations, and incorporating new evidence, perspectives, and methodologies.

Understanding Historiography:

Historiography refers to the study of how history has been written and interpreted. It is concerned not only with historical events but also with the methods, assumptions, debates, and intellectual contexts through which historians reconstruct those events. In the Indian context, historiography has developed through several major schools of interpretation. These include colonial, Orientalist, nationalist, Marxist, Cambridge, Subaltern, feminist, postcolonial, and other newer approaches. Contemporary academic resources on Indian historiography similarly identify colonial, nationalist, Marxist, Cambridge, Subaltern, gender, caste, tribal, religious, environmental, and economic history as important areas of historical interpretation. The emergence of different schools demonstrates that historical knowledge is neither completely fixed nor independent of society. Each historiographical approach emphasizes certain aspects of the past while potentially overlooking others. Rethinking Indian history therefore requires a comparative examination of these approaches.

Colonial Approaches to Indian History:

Colonial historiography played a foundational role in the modern institutionalization of Indian history. British administrators, Orientalists, missionaries, and European scholars produced extensive studies of Indian society, religion, languages, law, political institutions, and culture. Although colonial scholarship contributed significantly to the collection and preservation of historical materials, it was frequently shaped by the intellectual and political assumptions of colonialism. India was often represented as a civilization characterized by timeless traditions, social divisions, political instability, and cultural stagnation. Such representations could be used to legitimize colonial rule. Colonial knowledge was therefore not entirely separate from colonial power. The classification of communities, construction of administrative categories, and production of knowledge about Indian society formed part of a broader system of governance. Later historians, particularly those influenced by postcolonial approaches, questioned these inherited categories and examined how colonialism shaped the production of historical knowledge itself. The critique of colonial historiography does not require the rejection of all colonial sources. Instead, such sources must be read critically, with attention to their purpose, context, authorship, and institutional setting.

Nationalist Historiography and the Recovery of Indian Agency:

Nationalist historiography developed partly as a response to colonial interpretations. Indian historians sought to challenge representations of India as historically passive or incapable of self-government.

Nationalist historians emphasized India's cultural achievements, intellectual traditions, political institutions, social reform movements,

and resistance to colonial rule. They also sought to construct a historical narrative capable of contributing to national consciousness. This approach played an important role in recovering Indian agency. However, nationalist historiography also had limitations. In its attempt to construct a unified national narrative, it could sometimes privilege elite political leaders and underrepresent internal differences of caste, class, gender, region, religion, and ethnicity. Thus, while nationalist historiography challenged colonial interpretations, later historians argued that the history of Indian nationalism could not be understood exclusively through the activities of political elites.

Marxist Historiography and Material Structures:

Marxist historians introduced another important transformation in the study of Indian history. Rather than concentrating primarily on rulers, political institutions, and prominent individuals, Marxist approaches emphasized economic structures, class relations, and modes of production, agrarian systems, labour, and social conflict. This approach encouraged historians to investigate the relationship between economic change and political developments. Peasants, workers, landlords, merchants, and other social groups became important subjects of historical research. Marxist historiography consequently broadened historical analysis by drawing attention to structural factors. However, critics argued that an excessive emphasis on class and economic structures could sometimes understate the significance of culture, religion, caste, gender, and individual agency. The development of subsequent approaches did not necessarily eliminate Marxist history. Instead, many later historians combined material analysis with cultural and social perspectives.

Subaltern Studies and History from Below:

One of the most influential developments in modern Indian historiography was the emergence of Subaltern Studies during the early 1980s. The Subaltern Studies project challenged what its scholars regarded as the elitist character of existing interpretations of colonial Indian history. It sought to investigate the political consciousness and agency of groups that had been marginalized in elite-cantered narratives. Ranajit Guha played a central role in this intellectual movement. His work criticized both colonialist and nationalist historiographies for giving excessive importance to elites in explaining Indian nationalism and popular politics. The Subaltern approach attempted to examine history from the perspective of peasants, workers, tribal communities, and other groups outside established political elites.The importance of Subaltern Studies lies in its methodological challenge to conventional historical writing. It encouraged historians to ask whose voices were absent from historical narratives and how those voices might be recovered through alternative sources and interpretive methods. However, Subaltern Studies has also been debated and criticized. Some scholars have questioned whether it is possible to reconstruct the experiences of marginalized communities without relying on sources produced by elites or colonial institutions. Others have argued that the category of the "subaltern" can itself become too broad. Nevertheless, the movement fundamentally changed discussions of Indian historiography by emphasizing history from below.

Gender and the Reinterpretation of Indian History:

Feminist historiography further transformed the study of the Indian past by questioning the male-centered character of conventional historical narratives. Earlier

histories frequently focused on kings, administrators, political leaders, reformers, and male intellectuals, while women's experiences remained comparatively marginal. Gender historians have examined women's work, education, political participation, domestic life, sexuality, family structures, social reform, nationalism, and resistance. This approach has demonstrated that gender is not simply a separate subject of history but an important category for understanding political, social, and economic transformations. The study of gender also encourages historians to reconsider familiar narratives. For example, the history of Indian nationalism can be understood differently when women's participation, domestic politics, social reform, and debates over women's rights are incorporated into the analysis.

Caste, Dalit and Adivasi Perspectives:

Contemporary Indian historiography has increasingly emphasized the importance of caste, Dalit experiences, and Adivasi histories. Traditional narratives often represented Indian society through broad categories that could conceal significant inequalities and differences. Dalit historiography challenges historical narratives that marginalize the experiences and agency of oppressed caste communities. Similarly, Adivasi histories question narratives that treat tribal communities primarily as objects of colonial administration or development rather than historical actors. These approaches expand the meaning of historical agency. They encourage historians to examine oral traditions, autobiographical writings, community archives, local records, folklore, material culture, and other sources that may not have been central to conventional historical research.

Postcolonial Approaches and Decolonizing History:

Postcolonial approaches have encouraged historians to critically examine the intellectual legacies of colonialism. Decolonization in historiography does not simply mean replacing European historians with Indian historians. More fundamentally, it involves questioning the categories, assumptions, periodization, and hierarchies through which Indian history has traditionally been understood. The question of decolonizing Indian history has therefore become an important contemporary concern. Scholars have examined how colonial interpretations influenced historical knowledge and have advocated greater attention to indigenous perspectives and marginalized historical experiences. At the same time, decolonization should not become an uncritical celebration of everything described as indigenous. Historical claims—whether colonial, nationalist, or contemporary—must be evaluated through evidence and critical methodology. A decolonized historiography should therefore remain analytical rather than merely replacing one form of historical certainty with another.

Regional and Local Histories:

Another important development is the increasing attention to regional and local histories. A nation as geographically, linguistically, socially, and culturally diverse as India cannot be adequately understood through a single national narrative.

Regional histories can reveal experiences that disappear within broader narratives. The histories of Bengal, Punjab, Maharashtra, Tamil Nadu, Kerala, Karnataka, the Northeast, Rajasthan, and other regions demonstrate different trajectories of social change, political mobilization, economic development, and cultural transformation.

Microhistorical approaches similarly examine particular villages, communities, institutions, families, or local events. Such studies can challenge generalized assumptions and demonstrate how large historical processes affected ordinary people in different ways.

Environmental and Global Approaches:

Environmental history has introduced another significant dimension to the reinterpretation of the Indian past. It examines relationships between human societies and forests, rivers, agriculture, animals, climate, and other ecological systems. Environmental approaches can transform our understanding of colonialism, agrarian change, industrialization, tribal movements, urbanization, and state policies. They also connect historical research with contemporary concerns about climate change, environmental degradation, water scarcity, and sustainability. At the same time, global history has encouraged historians to situate India within broader networks of migration, trade, empire, capitalism, technology, knowledge, and cultural exchange. Recent scholarship has challenged interpretations that isolate South Asian history from wider global transformations and has explored how developments in India were connected to broader historical processes.

Digital History and New Sources:

The digital transformation of historical research has created new possibilities for Indian historiography. Digitized manuscripts, newspapers, government records, photographs, maps, oral-history collections, and archaeological databases can make previously difficult-to-access materials available to researchers. Digital tools can facilitate the analysis of large collections of texts and images and enable researchers to identify patterns that might be difficult to observe through traditional methods alone. At the same time, digital history creates new methodological challenges, including questions about the reliability of digitized sources, algorithmic bias, unequal access to archives, and the preservation of digital materials. Therefore, technological innovation should complement rather than replace traditional historical criticism.

Rethinking Historical Objectivity:

The changing approaches to Indian history raise an important question: Can historians write objective history? Complete neutrality may be difficult because historians inevitably select topics, questions, sources, and methods. However, acknowledging the interpretive character of history does not mean that all interpretations are equally valid. Historical arguments must remain accountable to evidence, transparent methodology, logical reasoning, and engagement with existing scholarship. A responsible approach to Indian history therefore requires distinguishing between interpretation and invention. Historians may disagree about the meaning of evidence, but historical claims should remain grounded in verifiable sources.

This distinction is especially important in contemporary debates in which history can become closely connected to political identity. The task of the historian is not simply to provide a politically convenient past but to investigate the past critically.

Contemporary Relevance of Reinterpreting Indian History:

The reinterpretation of Indian history has considerable contemporary significance. Historical narratives influence how societies understand identity, citizenship, community, heritage, and national belonging. The past is frequently invoked in debates about religion, caste, language, regional identity, monuments, educational curricula, and national identity.

Consequently, historical interpretation has consequences beyond universities and academic publications. This makes methodological responsibility particularly important. Historians should recognize the diversity of Indian experiences and avoid reducing complex historical processes to simplistic binaries. The history of India contains conflict as well as cooperation, continuity as well as change, and both elite and popular forms of agency. A plural approach can therefore provide a more comprehensive understanding of the Indian past. The development of Indian historiography demonstrates a movement from relatively dominant narratives toward increasingly diverse interpretations. Colonial historiography placed India within European frameworks; nationalist historiography sought to recover Indian agency; Marxist historian's emphasized material and class structures; Subaltern Studies focused attention on marginalized groups; feminist, Dalit, Adivasi, environmental, cultural, and postcolonial approaches further expanded the field.

These approaches should not necessarily be understood as mutually exclusive. Each provides a particular analytical lens. A contemporary historian may combine economic analysis with gender history, local sources with global perspectives, or political history with environmental analysis. The central challenge is therefore not to identify one final or "correct" interpretation of Indian history. Instead, the objective should be to create a historiography capable of accommodating multiple perspectives while maintaining rigorous standards of evidence. Rethinking the Indian past also requires recognizing the limitations of historical sources. Archives are not neutral repositories. They were produced by particular institutions and individuals and often reflect unequal structures of power. Oral histories and community memories can help address these gaps, but they too require critical evaluation. Consequently, methodological pluralism is essential. The historian should use diverse sources while remaining attentive to their origins, purposes, silences, and limitations.

Conclusion:

Rethinking the Indian past is an ongoing intellectual process rather than a single historiographical project. Indian history has been interpreted through changing frameworks shaped by colonialism, nationalism, Marxism, Subaltern Studies, feminism, postcolonial theory, caste studies, environmental history, regional history, and global history. Each approach has contributed to expanding historical knowledge while also presenting particular limitations. The contemporary task is not simply to replace one dominant narrative with another but to develop a more inclusive and critical understanding of the past. A renewed Indian historiography should give attention to multiple regions, communities, social groups, genders, classes, and forms of historical evidence. It should also critically examine inherited categories and recognize that historical narratives are shaped by the questions historians ask.

Ultimately, rethinking Indian history means making the past more complex rather than making it simpler. The objective of historiography should be to understand the diversity of historical experiences, evaluate competing interpretations through evidence, and recognize the agency of people who have traditionally remained at the margins of historical narratives. Such an approach can make Indian history not only academically richer but also more meaningful for understanding contemporary Indian society.

References:

1. Ahmed, K. (2014). Decolonizing Indian history. *Global Journal of Human-Social Science, 14*(D6), 1–6.
2. De Munck, J. (2004). The influence of Subaltern Studies on Indian historiography: A study of several approaches. *Acta Orientalia Vilnensia, 5*, 197–207.
3. Guha, R. (1982). On some aspects of the historiography of colonial India. In R. Guha (Ed.), *Subaltern Studies I: Writings on South Asian history and society* (pp. 1–8). Oxford University Press.
4. Kaiwar, V. (2018). Ranajit Guha's historiography of colonial India. In *Oxford Research Encyclopedia of Communication*. Oxford University Press.
5. Sharma, K. L. (2012). Revisiting Subaltern Studies. *INROADS: An International Journal of Jaipur National University, 1*(1), 68–78.
6. Sivaramakrishnan, K. (1995). Situating the subaltern: History and anthropology in the Subaltern Studies project. *Journal of Historical Sociology, 8*(4), 395–429.

Reference link:

- https://doi.org/10.15388/AOV.2004.18244
- https://doi.org/10.1093/acrefore/9780190228613.013.770
- https://doi.org/10.1111/j.1467-6443.1995.tb00173.x

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

The Economic Policy of Tipu Sultan

Bheemanagouda Shingnalli
Assistant Professor, Department of History,
Government First Grade College Hunagund – 587118, Bagalkot District, Karnataka
Corresponding Author – Bheemanagouda Shingnalli
DOI - 10.5281/zenodo.23058541

Abstract:

During the latter half of the eighteenth century, the Kingdom of Mysore in South India witnessed significant transformations in the political, military, and economic spheres. In this context, the economic policies of Tipu Sultan occupied an important place in the administrative system and economic development of the Mysore State. This research paper aims to examine the nature, objectives, implementation, and consequences of Tipu Sultan's economic policies from a historical perspective. Particular attention is given to the land revenue system, agricultural development, irrigation, trade and commerce, state-controlled monopolies, industries, silk production, and the monetary system.

Tipu Sultan undertook several measures not only to strengthen state revenue but also to increase agricultural production and encourage the economic activities of cultivators. In the collection of land revenue, emphasis was placed on direct state intervention, while irrigation facilities and systems of agricultural credit were encouraged. In the field of trade, attempts were made to organize internal and foreign commerce by establishing state control over important commercial commodities. Efforts were also made to expand the productive sector by promoting industries, particularly the silk industry. At the same time, changes were introduced in the monetary system with the objective of strengthening the economic and administrative autonomy of the state.

This study examines Tipu Sultan's economic policies not merely from the perspective of revenue collection but as a comprehensive economic system encompassing agriculture, trade, industry, and state control over finances. Ultimately, these policies provide an important historical basis for understanding the economic structure of the Mysore State in the eighteenth century and its competition with colonial powers.

Keywords: Tipu Sultan, Mysore State, Economic Policy, Land Revenue System, Agriculture, Trade, State Monopoly, Silk Industry, Commercial Regulations, Monetary Policy, Foreign Trade, Industrial Development, Mysore Economy, East India Company.

Introduction:

During the second half of the eighteenth century, the rule of Haider Ali and Tipu Sultan played an important role in the emergence of the Mysore State as a major political and economic power in South India. Tipu Sultan, who ruled Mysore from 1782 to 1799, introduced several changes not only in the military and administrative fields but also in agriculture, land revenue, trade, industry, state-controlled commerce, monetary policy, and silk production.

The major objectives of Tipu Sultan's economic policy included increasing state revenue, promoting agricultural production, expanding foreign trade, and maintaining the economic independence of the Mysore State from the influence of the East India Company as far as possible. In the land revenue system, emphasis was placed on reducing the influence of intermediaries and collecting revenue directly from cultivators. Measures such as irrigation works and *Taccavi* loans were adopted to promote agricultural development.

In the field of trade, Tipu Sultan strengthened state control over important commercial commodities such as sandalwood, black pepper, cardamom, arecanut, and other products. He attempted to connect Mysore's trade with foreign markets by developing commercial relations with coastal regions and ports such as Muscat and Jeddah. The commercial regulations of 1793–94 demonstrate the organized nature of his trade policy.

Tipu Sultan also showed considerable interest in industrial development. In order to develop the silk industry, encouragement was given to silkworm rearing and mulberry cultivation. Attempts were made to bring technology and skilled craftsmen from foreign countries to develop various productive activities. The measures adopted during Tipu Sultan's reign played an important role in the early development of the silk industry in Mysore.

Tipu Sultan also introduced changes in the monetary system. He issued coins in his own name and developed several mints. Changes were made in the weight, denomination, and nomenclature of coins, reflecting not only economic considerations but also the sovereignty of the state.

Thus, Tipu Sultan's economic policy should not be viewed merely from the perspective of taxation. It should be studied in the broader context of agricultural development, centralization of state finances, regulation of trade, industrial promotion, foreign commerce, and resistance to colonial economic influence. Against this background, the present study seeks to analyze the nature, objectives, implementation, and consequences of Tipu Sultan's economic policy.

A country cannot become prosperous merely because it possesses abundant resources. A country can become economically prosperous when it develops suitable markets for the resources it possesses, both at the national and international levels. Tipu Sultan understood this principle and worked actively in this direction.

Domestic Trade:

Depots and Trading Centres:

Tipu Sultan attached considerable importance to domestic trade. He established approximately thirty depots or trading centres at various places within his kingdom. Important centres included Srirangapatna, Bangalore, Kolar, Sathyamangala, Mulbagal, Madanapalle, Gurramkonda, Punganur, Chitradurga, Bednur, Shikaripura, Sonda, Mangalore, Kushalnagar, Karwar, Bhatkal, Jamalabad, Calicut, Banavasi, Nandidurga, and others.

One of the important features of domestic trade was that private merchants were not prohibited from purchasing indigenous products and reselling them to others. However, the government exercised control over the prices of commodities sold in retail markets. Suitable personnel were appointed to manage the operations of the depots.Wholesale trade was placed under state ownership and monopoly. Salt, iron, cardamom, black pepper, arecanut, tobacco, and sandalwood were among the commodities brought under state monopoly. Sandalwood oil extracted by the state from sandalwood was exported to foreign countries.

Since the government directly participated in domestic trade, it was able to obtain substantial profits from commodities such as black pepper, sandalwood, cash crops, precious stones, and other products. This also helped reduce the role of the British in such commercial activities and increase state revenue. Commodities were supplied to government stores at fixed prices, and the government paid cash for the goods purchased.According to the foreign traveller Francis Buchanan, the government did not maintain an excessively high profit margin in its commercial activities. For example, if the government purchased black pepper worth Rs. 100 from cultivators, it sold it for Rs. 150. European merchants, on the other hand, could purchase black pepper for Rs. 100 and sell it for as much as Rs. 1,000.

The government also provided opportunities for people to invest their capital in state commercial

activities. When individuals deposited money with the government for commercial purposes, they were provided with an additional return or profit. Since Islamic law did not permit interest-based transactions, the terms "additional return" or "profit" were used instead of interest.If a person deposited between 5 and 500 *imamis*, a profit of half an *imami* for each *imami* was provided at the end of the year. For deposits between 500 and 5,000 *imamis*, a profit of one-fourth of an *imami* for each *imami* was provided at the end of the year. For investments exceeding 5,000 *imamis*, twelve *imamis* were added for every 100 *imamis* at the end of the year.

This not only encouraged the habit of saving among the people but also provided security for their savings. The accumulated funds were utilized for productive purposes.Tipu Sultan did not encourage private trade to the same extent as state-controlled commerce. It has been alleged that Bangalore, which had been an important centre of commercial activity during the reign of Haider Ali, declined during Tipu Sultan's period because private merchants migrated to Tamil Nadu.

Foreign or Overseas Trade:

Factors that Inspired Tipu Sultan:

Commercial activity is fundamentally important for the economic advancement of a country. The Europeans became economically prosperous largely because of their commercial activities rather than agriculture alone. Tipu Sultan understood that trade contributed not only to economic prosperity but also to the strengthening of military capabilities. Influenced by this understanding, he worked to promote commercial activities. The Mysore State possessed large quantities of commercial crops and commodities such as black pepper, cardamom, silk, sandalwood, arecanut, coconut, ivory, and other valuable products. There was considerable demand for Mysore's commodities in Western markets. The Mysore State also possessed a favourable coastline for transporting goods to foreign countries.

Despite possessing these advantages, Mysore had not achieved the same level of commercial development as the Europeans. One reason was considered to be the relatively limited commercial skills of local merchants compared with Europeans. Therefore, Tipu Sultan attempted to involve the Mysore State as extensively as possible in commercial activities. Since Mysore possessed favourable conditions for commerce, Tipu Sultan sought to prevent foreign powers from exploiting these advantages. Consequently, the government itself became directly involved in commercial activities. As a result, Mysore became a significant exporting state.

Measures Undertaken by Tipu Sultan:

With the objective of promoting trade and commerce, Tipu Sultan personally wrote letters to Armenian merchants, including Yaqub and Ahmad, in January 1787. He also undertook several measures to expand foreign trade.Commercial depots were established in foreign countries and ports such as Hormuz, Aden, Basra, Bushire, Jeddah, and Muscat. Commercial representatives were appointed. Goods were loaded onto merchant ships and sent to foreign countries. Rice, in particular, was exported to Muscat.

Tipu Sultan sought to attract foreign merchants and expected reciprocal facilities to be provided to Mysorean merchants in foreign countries. At the same time, he sought to prevent colonial powers, particularly the British, from obtaining the major benefits of Mysore's trade.A major feature of Tipu Sultan's commercial policy was the restriction of trade with the British. This is evident from a letter he wrote to the Faujdar of Calicut in February 1787, in which he ordered that no goods should be sold to or purchased from the British who came to Calicut.

Concessions Granted to Foreign Merchants:

Apart from the British, Tipu Sultan provided various concessions and facilities to foreign merchants. Foreigners were permitted to bring goods into the Mysore State or take goods out of the state by land or water routes, particularly silk

products. Suitable sites were provided for constructing commercial establishments. Accommodation was made available to foreign merchants. When merchants required labourers, arrangements were made to provide them with workers. Advance payments or loans were also provided.

Foreign merchants were granted exemption from customs duties for a period of two years. During this period, they were permitted to retain the profits they earned. Protection was also assured to foreign merchants. With the intention of attracting merchants from Muscat, Tipu Sultan personally wrote letters to them and informed them about the concessions in customs duties. At the same time, commercial contact with the British was prohibited.

Tipu Sultan's policy of restricting British commercial influence adversely affected British commercial interests, particularly because the British depended heavily on the pepper trade of Malabar. By restricting British participation in the pepper trade, Tipu Sultan attempted to sell pepper directly in the Persian Gulf region.A letter written in September 1786 by a British agent at Basra to the Company's Court of Directors indicates British concern that Tipu Sultan was directly conducting the pepper trade. He also redirected the export of cardamom towards Arabia and the Middle East. Sandalwood was exported to China rather than to Europe.

Board of Commerce:

During Tipu Sultan's reign, several commercial establishments operated in places such as Muscat, Kutch, Kurnool, Madras, Pondicherry, Pune, Vairang near Pune, Humnabad, Nanded, Mahe, and Raichur.

In order to manage foreign trade efficiently, Tipu Sultan established a separate commercial department. Its nine members were known as *Malik-ul-Tujjar*, meaning "Lords of the Merchants," or the Board of Commerce.

The principal responsibilities of this department included:

1. Managing all imports and exports.
2. Opening new commercial establishments whenever necessary.
3. Inviting foreign merchants to Mysore by providing suitable incentives and assurances.
4. Preventing fraud, cheating, and misuse in commercial activities through strict supervision and warnings of punishment.
5. Appointing the necessary staff to manage commercial establishments.
6. Reporting misconduct by officials directly to the Sultan and arranging appropriate punishment.
7. Maintaining detailed records of profits and losses.
8. Depositing prescribed taxes into the state treasury, just as private merchants were required to do.

The Board met whenever necessary and took decisions through discussion and majority opinion. Each member was required to record the proceedings separately in a designated book, seal it, and send it to the Sultan in a sealed box. If the matter involved an important or large-scale commercial transaction, the proceedings had to be personally presented to the Sultan.

Orders issued by the Sultan were authenticated with the appropriate royal seal and preserved in the treasury at the capital.

Overseas Commercial Centres:

Muscat – Persian Gulf Region:

There were two commercial establishments in Muscat. One dealt with approximately fifty varieties of Mysorean commodities, while the other dealt with thirty-five varieties. A permanent commercial commissioner, Mir Qasim, was appointed to supervise these activities.As a result, Tipu Sultan emerged as a commercial competitor to the British in the Persian Gulf region. Rice was one of the principal commodities exported to Muscat.

If rice sold in Muscat was to be resold to any European merchant, permission from Tipu Sultan was required. This condition was intended to restrict British commercial interests and political

influence.Through the French, arrangements were also made to enable Mysorean commodities to reach European markets through the Persian Gulf.

Tipu Sultan paid attention even to minor details of commercial administration. For example, ships arriving from India at Muscat were required to unload their cargo within two days. Similarly, goods had to be loaded onto ships within two days. If this was not done, the additional expenses were to be borne by the concerned officials. Tipu Sultan communicated these instructions to his officials in Muscat through letters.

Oman: Tipu Sultan maintained good relations with Oman. Although no formal treaty was concluded with Oman, commodities such as dates, horses, silkworms, sulphur, and pearls were imported from the region into Mysore.

China: Tipu Sultan was also highly interested in establishing and expanding trade with China. Merchants were encouraged to import rare commodities from China in large quantities by ship. Licences were issued for this purpose, and security arrangements were also provided.

Pegu (Burma): Tipu Sultan sent two envoys, Muhammad Qasim and Muhammad Ibrahim, to Pegu. They carried letters of request and valuable gifts.

Administrative System of Overseas Commercial Establishments:

Three categories of employees were appointed to administer Tipu Sultan's overseas commercial establishments.

1. Commercial Ambassador (*Daroga*): The *Daroga* was the chief administrator responsible for the entire commercial establishment.

2. Accountants: They assisted the *Daroga* and handled all financial transactions.

3. Commercial Agents: They acted as intermediaries and established contacts between buyers and sellers.

Profitable Nature of Trade:

Tipu Sultan's commercial policy was intended to be beneficial to the state. Exports were generally maintained at a higher level than imports. However, the policy had certain limitations. One of Tipu Sultan's limitations was his attempt to achieve extensive results within a relatively short period. Therefore, it would be difficult to conclude that his foreign trade policy was completely successful. Nevertheless, it can be argued that his initiatives provided an important model and direction for those who subsequently administered the state.

Industries:

The major industries associated with Tipu Sultan's economic policy included:

1. Iron industry
2. Manufacture of rockets
3. Arms and weapons manufacturing
4. Shipbuilding
5. Silk industry
6. Textile industry
7. Other industries

Mysore was predominantly an agricultural state. Nevertheless, Tipu Sultan took several measures to transform it into a state with a stronger industrial base. Industry not only provided profitable employment opportunities but also increased the wealth of the people and the state. Therefore, Tipu Sultan actively promoted industrial development. When writing to distinguished persons in Paris, Constantinople, Tehran, Muscat, and other regions, Tipu Sultan requested that skilled technicians and craftsmen be sent to Mysore. When he sent a diplomatic mission to Turkey in 1784, he specifically instructed the members of the mission to bring back skilled and technically qualified persons from Constantinople. As a result of these efforts, industries such as shipbuilding, silk, cotton textiles, iron manufacturing, ammunition and weapons production, and oil processing developed in Mysore.

Iron Industry:

The purification and casting of iron ore were carried out at Madhugiri, Channarayapatna, Hagalawadi, and Devarayadurga. Tipu Sultan referred to the ironworks as *Taramandalas*.

Important ironworks were located at Srirangapatna, Bangalore, Chitradurga, and Bednur. At Srirangapatna, there were five units engaged in converting iron into steel.

Iron was used to manufacture guns, muskets, cannons, knives, scissors, and watches at Madhugiri, Channarayapatna, Hagalawadi, Devarayadurga, and Srirangapatna.

The ironworks at Srirangapatna were particularly famous. According to Kirmani, the products manufactured there were comparable to European products.

Manufacture of Rockets:

Tipu Sultan is credited with laying an important foundation for the systematic manufacture and use of military rockets. Machines operated with hydraulic power were used in certain manufacturing processes. The French engineer Lafolie is said to have played an important role in this field.

Arms Manufacturing Centres:

Because of the extensive requirement for weapons, Tipu Sultan established an arms manufacturing centre at Bangalore. According to Moore, the machinery installed there was sufficiently advanced that one machine could simultaneously drill fifty musket barrels as well as the barrel of a gun. Machinery was also used for boring cannon barrels.

Shipbuilding Industry:

Tipu Sultan showed considerable interest in shipbuilding because of its importance for maintaining commercial relations with foreign countries and protecting the coastal boundaries of his state.He studied the naval systems of the Portuguese, Dutch, French, and British. He also brought hundreds of skilled technicians from foreign regions, particularly Muscat.After making these preparations, shipbuilding centres were established at Mangalore, Sadashivgad, and other coastal locations.

Kirkpatrick observed that the ships constructed at Mangalore were extremely strong and durable. The development of shipbuilding enabled Tipu Sultan to maintain a naval force. He is said to have possessed approximately forty warships stationed at Calicut, Mangalore, and Sadashivgad.

Silk Industry:

Silk production was one of the areas in which Tipu Sultan took particular interest. Mysore's climate was favourable for mulberry cultivation. Therefore, silkworms were brought from Bengal and Muscat, and sericulture was encouraged. Arrangements were made for silk cultivation at approximately twenty-one centres. The measures undertaken by Tipu Sultan played an important role in the development of sericulture in Mysore. Along with sericulture, Tipu Sultan encouraged the weaving of silk textiles. Communities such as the Pattagars and Khatris were involved in this occupation and produced fine silk fabrics. Bangalore also possessed a considerable number of skilled weavers. However, following Tipu Sultan's death, the weavers faced difficult economic circumstances.

Textile Industry:

As a result of Tipu Sultan's encouragement, weaving developed into an important industry. Sathyamangalam had approximately 800 looms, while Coimbatore had around 46 looms.

The looms established under state encouragement produced fine textiles. These included *shalus*, *kinkhab*—silk cloth woven with gold or silver threads—and broadcloth intended for European markets.

Muslin, one of the most famous varieties of cloth in India, was also produced in Mysore. Bangalore became well known for textile production. Nelaghatta, near Srirangapatna, and Coimbatore were also important textile centres.

Nelaghatta was known for cloth production, Coimbatore for fine cotton fabrics, and Gubbi for sarees. Kerala was known for long-cloth varieties.

However, weavers often depended upon merchants for their livelihood because they received advance payments or loans from merchants. Consequently, they were compelled to sell the cloth they produced at relatively low prices. Buchanan

observed this condition in his account. Only a small number of financially stronger weavers enjoyed relatively favourable economic conditions.

Other Industries:

Mysore possessed an extensive coastal region. Therefore, arrangements were made for pearl fishing near Mangalore, which subsequently developed into an economic activity.

Other important industries included leather tanning, oil pressing, polishing and cutting stones into various shapes, and sheep rearing.

Glass, porcelain, and Mysorean handicrafts were also produced in significant quantities. There was a paper factory at Srirangapatna, a factory producing wire for musical instruments at Channapatna, and sugar factories in Mysore.

Skilled persons were brought from China to produce high-quality sugar and rock sugar.

Mint and Monetary System:

During Tipu Sultan's reign, there were approximately twelve mints. Important mints were located at Srirangapatna, Mysore, Bangalore, Bednur, Chitradurga, Dharwad, Gooty, and other places.

Coins were minted to facilitate financial transactions. Some coins were artistically designed, with representations of elephants and Persian inscriptions. Henderson praised the artistic quality of Tipu Sultan's coins and observed that it was difficult to find coins more beautiful than them.

Gold, silver, and copper were used for minting coins. The coins were known by various names, including *Ahmadi, Siddiqi, Faruqi, Fanam* or *Rahati* among gold coins; *Haideri* and *Imami* among silver coins; *Akhaydi* (half rupee), *Bakiri* (quarter rupee), and *Jafari* (12.5 rupees).Copper coins included *Usmani, Joh, Baram, Hadtir,* and *Qutb Panam*, along with other denominations known as *Tanka* and *Kasu*.

Through these economic measures, Tipu Sultan encouraged the development of agro-based industries in Mysore. This contributed to the emergence of a skilled labour force and increased employment opportunities. Consequently, the industrial sector became an important component of the Mysorean economy.

Conclusion:

The study of Tipu Sultan's economic policy reveals an attempt to establish a more centralized and state-controlled economic system in the Mysore State during the late eighteenth century. In the agricultural sector, importance was given to direct revenue collection, irrigation development, and agricultural credit. These measures were intended to strengthen and stabilize state revenue.

In the field of trade, the state sought to expand Mysore's commercial capabilities through control over important commodities and the establishment of overseas commercial centres. At the same time, state encouragement and intervention were visible in productive sectors such as silk, weapons, sugar, and paper manufacturing. Historians have examined these measures as attempts to reduce the economy's dependence on agriculture alone.

However, these policies also had certain limitations. The state's commercial monopolies and restrictions on private trade caused dissatisfaction among some merchants, a subject that has been discussed in historical scholarship. Therefore, Tipu Sultan's economic policy should not be simply characterized as either completely successful or completely unsuccessful. Rather, it may be understood as a **state-centred economic experiment developed within the political, military, and colonial competition of the late eighteenth century**.

Overall, Tipu Sultan's economic policy represented an effort to expand the role of the state in **agriculture, land revenue, trade, industry, and the monetary system**. For this reason, his economic policies occupy an important place in understanding the economic history of South India during the eighteenth century.

References:

1. Hasan, Mohibbul. *History of Tipu Sultan*. Calcutta: Aakar Books / relevant editions.
2. Brittlebank, Kate. *Tipu Sultan's Search for Legitimacy: Islam and Kingship in a Hindu Domain*. Oxford University Press, 1997.
3. Yazdani, Kaveh. *India, Modernity and the Great Divergence: Mysore and Gujarat (17th to 19th Centuries)*. Brill, 2017.
4. Yazdani, Kaveh. "Precolonial Capitalist Development and the Potentialities of Industrialization in Mysore." In *Capitalists: Towards a Global History*. Oxford University Press, 2020.
5. Kirkpatrick, William, trans. *Select Letters of Tippoo Sultan to Various Public Functionaries*. London, 1811.
6. Buchanan, Francis. *A Journey from Madras through the Countries of Mysore, Canara, and Malabar*. 1807.
7. Habib, Irfan, ed. *Confronting Colonialism: Resistance and Modernization under Haidar Ali and Tipu Sultan*. Tulika, 2002.
8. Parthasarathi, Prasannan. *Why Europe Grew Rich and Asia Did Not: Global Economic Divergence, 1600–1850*. Cambridge University Press, 2011.
9. Lingraju. "Tipu Sultan's Mint and Monetary Policy – An Analysis." *Shanlax International Journal of Arts, Science and Humanities*, 2021.
10. Lingraju. "Tipu Sultan and the Malabar Trade Routes – Commercial Perspectives." *Social Science Journal for Advanced Research*.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Contributions of Women of the Ratta Dynasty: A Study

Dr. Shakuntala Ajjannavar
Assistant Professor of History,
K. M. Mamani First Grade Government College, Saundatti
Belagavi District, Karnataka, 9480586253
Corresponding Author – Dr. Shakuntala Ajjannavar
DOI - 10.5281/zenodo.23058559

Abstract:

The Ratta dynasty occupies an important place in the medieval history of northern Karnataka. The Rattas of Saundatti, also associated with the historical centres of Sugandhavarti and Belagavi, played an important role in the political, religious and cultural history of the region. The history of the Ratta dynasty has generally been studied through the achievements of male rulers and chiefs. However, inscriptions and other historical sources also provide evidence about the presence and activities of women connected with the Ratta ruling family. The contribution of these women deserves greater attention in regional historical studies.

This paper attempts to examine the contribution of women associated with the Ratta dynasty, particularly through epigraphic evidence. The study focuses on women such as Nijiyabbe, Chandikabbe, Bhagaladevi, Padmaladevi or Padmavati, Chandrikadevi or Chandaladevi, Echaladevi and Ahalyadevi or Mahalakshmi, whose names occur in records associated with the Ratta chiefs. The available evidence suggests that women participated in religious patronage, land and property-related donations, support for Jaina institutions and the maintenance of religious establishments. The evidence also shows that queens and women of ruling families formed an important part of the social and political structure of the period.

The paper argues that the history of the Ratta dynasty should not be studied only through military achievements and political administration. The activities of women provide another dimension for understanding medieval Karnataka. Their contributions to religion, charity, institutions, family alliances and cultural life reveal the wider role of women in medieval society. At the same time, the limited nature of the surviving evidence requires careful interpretation. The study therefore uses inscriptions and historical writings to reconstruct the contribution of Ratta women and to highlight the importance of including women's history in the study of regional heritage and identity.

Keywords: Ratta Dynasty, Saundatti, Women, Queens, Epigraphy, Jainism, Medieval Karnataka, Heritage, History, Belagavi.

Introduction:

The history of Karnataka is rich in dynasties, kingdoms, religious movements, cultural traditions and regional political centres. Among the important regional ruling families of northern Karnataka were the Rattas of Saundatti. The Ratta chiefs ruled from the region of Saundatti, historically known as Sugandhavarti, and were connected with Belagavi or Velugrama. Their history is mainly reconstructed through inscriptions found at Saundatti, Belagavi and other places in northern Karnataka. Epigraphic records identify the ruling family as the Ratta family and provide information about their political position, genealogy, religious activities and grants.

The Rattas were initially associated with larger political powers such as the Rashtrakutas and later the Western Chalukyas. Over time, the Ratta chiefs developed their own political importance in the region. Their inscriptions are found in several places, including Saundatti, Sogal, Nesargi, Konnur, Kabbur and other parts of present-day Belagavi

region. The Archaeological Survey of India also records Ratta inscriptions at Saundatti, including inscriptions at the Ankuseshvara temple and Jaina temple.

The study of the Ratta dynasty has traditionally concentrated on rulers such as Prithvirama, Santivarma, Kartavirya and Lakshmideva. Their political activities, military achievements and grants are relatively well known. However, women connected with the Ratta ruling family also appear in inscriptions. Their names are often mentioned in connection with kings, husbands, family relationships and religious activities. Such references provide important evidence for understanding the position and activities of women in medieval Karnataka.

The study of women in history has become an important area of historical research. Earlier historical writing often concentrated on kings, wars, political institutions and male rulers. Modern historical research has expanded its focus to include women, ordinary people, religious communities, artisans, peasants and other social groups. Epigraphic studies are particularly useful for recovering the activities of women because inscriptions sometimes record their names, relationships, donations and religious patronage.

The available evidence concerning Ratta women is not large. Therefore, this paper does not attempt to present them as a homogeneous group or to make claims beyond the evidence. Instead, it examines the available inscriptional references and tries to understand the contribution of women within the political, religious and social structure of the Ratta period.

Objectives of The Study:

The present study has the following objectives:

1. To examine the historical background of the Ratta dynasty of Saundatti.
2. To identify women associated with the Ratta ruling family through inscriptional evidence.
3. To examine the religious and cultural contributions of Ratta women.
4. To understand women's role in supporting Jaina institutions and religious establishments.
5. To examine the position of queens and royal women within the Ratta family.
6. To understand the importance of women in the social and cultural history of medieval Karnataka.
7. To highlight the importance of inscriptions in reconstructing women's history.
8. To contribute to the study of women, heritage and regional identity in northern Karnataka.

Methodology:

The present study is mainly based on the historical, descriptive and analytical methods. The principal sources for the study are inscriptions and published historical works relating to the Ratta dynasty of Saundatti and medieval Karnataka.

Epigraphic sources are particularly important because the history of the Rattas is known largely through inscriptions. J. F. Fleet's study of the dynasties of the Kanarese districts provides an important early reconstruction of the Ratta genealogy and inscriptions. His work identifies several Ratta rulers and their queens and discusses records from Saundatti, Belagavi and neighbouring areas.

The present study also makes use of published collections of South Indian inscriptions and archaeological records. The Archaeological Survey of India records Ratta inscriptions at Saundatti, including the Ankuseshvara temple inscription, while government heritage documentation lists Ratta inscriptions at Saundatti, Sogal and Nesargi.

Secondary sources relating to Jainism and medieval Karnataka have also been consulted. Ram Bhushan Prasad Singh's study of Jainism in early medieval Karnataka is particularly useful for understanding the religious and social context of Jaina patronage in the Ratta period.

The evidence has been critically examined to distinguish between what is directly recorded in

inscriptions and what may be inferred from the historical context. Since the surviving evidence concerning women is limited, the study avoids making unsupported claims about their political authority.

Historical Background of The Ratta Dynasty:

The Ratta dynasty of Saundatti occupies an important position in the history of northern Karnataka. The Ratta rulers were connected with the region around Saundatti and Belagavi. Historical records refer to Saundatti as Sugandhavarti or Sugandhavarti-nadu, while Belagavi appears as Velugrama in some records.

The relationship between the Rattas and the Rashtrakutas has been discussed by several epigraphists. J. F. Fleet observed that the practical family name of the princes of Saundatti was Ratta, while Rashtrakuta was used in certain formal genealogical contexts. Ratta inscriptions use expressions such as Ratta-vamsha and Ratta-kula to identify the ruling family.

The Ratta chiefs were associated with major political powers of the Deccan. Their position changed according to the political circumstances of the period. The records show their connection with the Rashtrakutas and later the Western Chalukyas.

The Ratta period is particularly important for the history of Jainism in northern Karnataka. Jaina establishments received patronage from members of the Ratta ruling family and other local elites. Saundatti contains important Jaina remains and inscriptions. Government heritage records identify two Jaina inscriptions at Saundatti dated to Shaka 797 and 902, as well as Ratta inscriptions at the Ankuseshvara temple.

The political history of the Rattas continued through several generations. Among the important rulers were Santivarma, Kartavirya II, Kartavirya III, Lakshmideva I and Kartavirya IV. Their inscriptions provide information not only about political history but also about religion, land grants, temples and social institutions.

Women of The Ratta Dynasty: Epigraphic Evidence:

The history of women associated with the Ratta dynasty is mainly known through inscriptions, genealogical records, temple records, and references to land grants. Unlike the male rulers, whose political achievements are often described in detail, women are generally mentioned briefly in the epigraphic records. However, these references are important because they provide evidence about the position and participation of women within the Ratta royal family and its religious and social institutions. The inscriptions of the Ratta period, particularly those found at Saundatti and neighbouring places, help us understand that women were not completely absent from the public and religious life of the period. They were connected with royal households, religious establishments, property and land grants, and the continuation of family traditions.

One of the important women associated with the Ratta family was Nijiyabbe or Nijikabbe. She was connected with the family of Santivarma, a Ratta chief who made a land grant to a Jaina temple at Saundatti in about A.D. 980. According to the available historical evidence, Nijiyabbe also made a grant of 150 nivartanas of cultivable land to the same Jaina institution. This reference is significant because it provides direct evidence of a woman participating in religious patronage and the transfer or donation of economic resources. It shows that women of the ruling family could possess or exercise rights connected with property and could support religious institutions.

Another important name is Chandikabbe, the wife of Santivarma. Her name occurs in connection with the royal genealogy. Although the surviving evidence does not provide extensive information about her independent activities, her identification as the queen of Santivarma is useful for understanding the structure of the Ratta royal household. Similarly, Bhagaladevi, the wife of Kartavirya II, is associated with an inscription concerning the renewal of an earlier land grant to a

religious institution. The Archaeological Survey of India records that Kartavirya, together with his wife Bhagaladevi, renewed a former land gift connected with the Ankuseshvara temple at Sugandhavarti. This evidence is particularly valuable because it associates a Ratta queen directly with a religious endowment.

The inscriptions also preserve the names of several other women through genealogical references. Padmaladevi or Padmavati was the wife of Kartavirya III, while Chandrikadevi or Chandaladevi was the wife of Lakshmideva I. Kartavirya IV is also recorded as having wives named Echaladevi and Ahalyadevi or Mahalakshmi. These references may appear brief, but they are important for reconstructing the genealogy of the Ratta ruling family and understanding the role of marriage in maintaining dynastic relationships. The evidence, however, does not allow us to describe all these women as rulers or administrators. In most cases, the inscriptions establish their identity and relationship with the ruling family rather than recording detailed accounts of their independent political activities.

The epigraphic evidence therefore presents a limited but meaningful picture of women in Ratta society. It indicates that royal women could be associated with religious institutions, land donations, family alliances and dynastic continuity. Their association with Jain temples is especially significant in the history of Saundatti, where Jainism received patronage from members of the Ratta ruling family. The evidence also reminds historians that the absence of detailed records does not necessarily mean the absence of women's participation. Medieval inscriptions were often concerned mainly with rulers, victories, grants and religious establishments, and therefore the activities of women were not always recorded in detail. A careful study of the available inscriptions, therefore, allows us to recover the contribution of Ratta women without making claims that go beyond the evidence. Their presence in inscriptions helps broaden the history of the Ratta dynasty from a purely political history to a social, religious and cultural history in which women also had an important place.

Women And Jaina Patronage:

One of the most significant aspects of the Ratta period was the patronage extended to Jainism. Saundatti became an important centre of Jaina religious activity, and inscriptions provide evidence of temples, land grants and religious teachers.

Research on Jainism in early medieval Karnataka shows that Ratta chiefs and members of their families supported Jaina institutions. In one important example, Santivarma's mother Nijiyabbe is recorded as making a land grant to a Jaina temple at Saundatti. Other members of the Ratta family also continued the tradition of supporting Jaina establishments.

Women's participation in religious patronage needs to be understood within this larger social and religious environment. Donations to religious institutions were not only acts of personal devotion. They also helped establish and maintain temples, monasteries and educational centres.

Through such patronage, women could contribute to the development of religious and cultural institutions. Their support also helped preserve religious traditions and artistic activities.
The evidence from the Ratta period therefore contributes to the larger history of women's participation in the religious life of medieval Karnataka.

Women, Land Grants and Economic Resources:

Land was one of the most important economic resources in medieval South India. Religious institutions frequently depended upon grants of land and revenue.

The Ratta inscriptions provide evidence of land grants to temples and religious establishments. The participation of women in such activities is particularly significant.

Nijiyabbe's land grant to the Jaina establishment at Saundatti provides an important

example. The record indicates that women belonging to ruling families could participate in the transfer of economic resources for religious purposes.

Bhagaladevi's association with the renewal of a former grant to the Ankuseshvara temple provides another example of a queen's connection with religious endowments.

These examples suggest that royal women had access to, or participated in decisions concerning, resources used for religious institutions. However, the precise legal and administrative nature of their authority cannot always be established from the surviving records.

Women And Dynastic Continuity:

Marriage was an important part of the political and social structure of medieval ruling families. Royal marriages could strengthen relationships between ruling houses and provide continuity to dynasties.

The appearance of queens' names in Ratta genealogies shows their importance in establishing family relationships. Padmaladevi, Chandrikadevi, Echaladevi and Ahalyadevi are examples of women whose names are preserved through dynastic records.

The inclusion of queens in genealogies also shows that women's identities were important to the construction of dynastic memory.

At the same time, historians should distinguish between being part of a dynasty and exercising independent political authority. The surviving Ratta evidence does not provide sufficient information to describe all these women as rulers or administrators.

This distinction is important for responsible historical interpretation.

Women and The Cultural History of The Ratta Period:

The contribution of Ratta women should also be understood within the broader cultural environment of medieval Karnataka.

The Ratta period witnessed the development of temples, Jaina institutions, religious traditions and Kannada cultural life. The patronage of religious institutions supported not only religious activities but also architecture, sculpture, education and literary culture.

Women who contributed to religious establishments therefore indirectly participated in the cultural development of the region.

Temples and Jaina institutions were not simply places of worship. They could also function as centres of learning, social interaction and cultural activity. Donations and endowments helped these institutions continue their activities.

Thus, the religious patronage of women forms an important part of the cultural history of the Ratta period.

Saundatti as A Centre of Ratta Heritage:

Saundatti has special significance in the study of the Ratta dynasty. The town and its surrounding region contain several inscriptions connected with the Ratta period.

The Archaeological Survey of India records Ratta inscriptions at the Ankuseshvara temple, including records dated to Shaka 971 and 1010, as well as earlier inscriptional fragments. It also records two inscriptions in the ancient Jaina temple at Saundatti.

These monuments and inscriptions are valuable sources for reconstructing the history of the Ratta period.

For present-day Saundatti, this heritage has an additional importance. The study and preservation of Ratta inscriptions can strengthen awareness of the historical significance of the region. Local colleges and historians can contribute by documenting inscriptions, monuments and oral traditions.

Therefore, the history of Ratta women is not only an academic subject. It is also connected with the heritage and historical identity of the Saundatti region.

Women's History and Reinterpreting the Ratta Past:

The study of Ratta women provides an opportunity to reinterpret the history of the dynasty from a broader perspective.

Traditional dynastic history often focuses on kings, battles, political administration and territorial expansion. Such studies are important, but they do not provide the complete picture of society. Women's history asks additional questions:

- Who were the women connected with ruling families?
- What religious institutions did they support?
- What kinds of donations were made by women?
- How were women represented in inscriptions?
- What role did women play in dynastic continuity?
- What can their recorded activities tell us about medieval society?

The available Ratta evidence does not answer all these questions, but it provides important clues.

A woman such as Nijiyabbe, who is associated with a land grant to a Jaina temple, demonstrates that women could participate in religious endowment. Bhagaladevi's association with the renewal of a temple grant provides another example. The names of queens preserved in genealogical inscriptions demonstrate their place in dynastic memory.

Thus, women's history can broaden our understanding of the Ratta dynasty beyond political narratives.

Findings:

The study of the available evidence leads to several important findings.

- First, women were an identifiable part of the Ratta ruling and aristocratic families. Their names appear in genealogical and inscriptional records.
- Second, women participated in religious patronage. The example of Nijiyabbe's grant to a Jaina institution at Saundatti provides direct evidence of women's involvement in religious endowment.
- Third, Bhagaladevi's association with the renewal of a grant to the Ankuseshvara temple provides evidence of the participation of a queen in the continuation of a religious endowment.
- Fourth, the names of Padmaladevi, Chandrikadevi, Echaladevi and Ahalyadevi in dynastic records demonstrate the importance of women in preserving royal genealogy and dynastic memory.
- Fifth, women's contributions were closely connected with religion, family, property and cultural institutions. The available evidence is stronger for these areas than for independent political administration.
- Sixth, the Ratta evidence demonstrates the importance of inscriptions for studying women's history. Inscriptions can provide information that is not easily available from conventional political narratives.

Finally, the study shows that the history of the Ratta dynasty can be better understood when women's activities are included along with political and military history.

Suggestions:

The study suggests several areas for further research.

- First, more systematic study of Ratta inscriptions from Saundatti, Belagavi, Sogal, Nesargi, Konnur and neighbouring

areas should be undertaken. The inscriptions should be photographed, digitised, translated and made accessible to researchers and students.

- Second, a separate database of women mentioned in Ratta and other medieval Karnataka inscriptions can be prepared. Such a database could include the names of queens, mothers, daughters, donors and other women, together with the nature of their recorded activities.
- Third, local colleges in Saundatti and Belagavi can undertake community-based heritage projects to document Ratta inscriptions, temples and historical sites.
- Fourth, students of history can be encouraged to conduct oral-history projects concerning local historical traditions, while clearly distinguishing oral tradition from verified inscriptional evidence.
- Fifth, greater attention should be given to women's contributions to religious institutions, education, art, architecture and cultural life in medieval Karnataka.

Finally, the study of Ratta women should be connected with the broader history of women in the Deccan. Comparative research involving the Rashtrakutas, Western Chalukyas, Hoysalas and other contemporary dynasties may provide a better understanding of the changing position and activities of women during the early medieval and medieval periods.

Conclusion:

The Ratta dynasty occupies an important place in the history and heritage of northern Karnataka. Saundatti and the surrounding Belagavi region preserve valuable evidence of the political, religious and cultural activities of the Ratta chiefs. Although historical writing has generally concentrated on male rulers, the inscriptions also preserve the names and activities of women associated with the dynasty.

The evidence concerning women is limited, but it is significant. Nijiyabbe's association with a land grant to a Jaina temple at Saundatti provides direct evidence of a woman's participation in religious patronage. Bhagaladevi's association with the renewal of a religious endowment demonstrates the participation of a queen in the maintenance of a temple institution. The appearance of Padmaladevi, Chandrikadevi, Echaladevi and Ahalyadevi in genealogical records demonstrates the place of women within the dynastic structure and historical memory of the Ratta family.

The study also demonstrates that women's history should not be limited to identifying women who exercised independent political power. Their participation in religious patronage, economic endowments, family structures and cultural institutions is also historically important.

The Ratta inscriptions therefore provide an opportunity to reinterpret the history of medieval Karnataka from a wider perspective. By studying women along with rulers, administrators, religious leaders and ordinary people, historians can develop a more inclusive understanding of the past.

For Saundatti and the Belagavi region, this research has special significance because the historical remains of the Ratta period form an important part of the region's heritage. Preserving and studying these inscriptions can help connect contemporary society with its historical past.

The study of the contributions of women of the Ratta dynasty therefore contributes not only to women's history but also to the themes of history, heritage, culture and identity. It demonstrates how inscriptional evidence can help recover the less visible contributions of women and can provide new perspectives for understanding the history of medieval Karnataka.

References:

1. Archaeological Survey of India. (n.d.). *Ratta inscription dated Shake 971 and 1010 and a fragment of another dated Shake 970 in the temple of Ankuseshvar*. Dharwad Circle.
2. Fleet, J. F. (1882). *The dynasties of the Kanarese districts of the Bombay Presidency: From the earliest historical times to the Muhammadan conquest of A.D. 1318*. Government Central Press.
3. Government of India, Ministry of Culture. (n.d.). *Heritage and archaeological sites in Belgaum District*. Press Information Bureau.
4. Singh, R. B. P. (2008). *Jainism in early medieval Karnataka, c. A.D. 500–1200*. Motilal Banarsidass.
5. Verma, A. (2010). Women administrators in epigraphic sources: AD 600–1200. *Indian Historical Review, 37*(1).
6. *Epigraphia Indica*. (n.d.). Records relating to the Ratta princes of Saundatti and their genealogy.
7. *The Indian Antiquary*. (1896–97). Records relating to the Ratta great chieftains of Saundatti and Belgaum.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

The Educational Implications of Using AI –in Teaching

K. S. Mahesha
Assistant Professor, Dept. of History
JSS College for Women, Kollegal Taluk, Chamarajanagara District, Karnataka State
Corresponding Author – K. S. Mahesha
DOI - 10.5281/zenodo.23058569

Abstract:

This paper discusses the educational implications of using AI and focuses on the benefits and challenges faced by education sector in applying AI. The potential of the AI in enhancing the educational environment is prospectively very high. AI is transforming the educational system through offering personalised learning experiences to learners. AI is transforming the traditional class room teaching, colonial era influenced learning practices, and creativity barred learning. AI is hailed because it can allow teachers to spend more time on research, lesson planning, mentoring and counselling slow learners. But the utilizing of AI in educational environment and administration is tagged with significant challenges and constraints along with benefits. The data privacy concerns, algorithms bias, the possibility of reduced critical thinking and lack of ethical standards need strong policy interventions. The AI has been a bone of contention between academicians and researchers for the benefits accrued and the challenges ahead. The over reliance on AI is demanding stringent policy interventions in regulating AI usage. These challenges need to be addressed by appropriate policy interventions.

Keywords: AI, Educational Implications, Benefits and Challenges.

Introduction:

The potential of the AI in enhancing the educational environments has been very promising. AI is making the learning more effective, engaging the learners and creating technological adaptability to young learners. AI is transforming the educational system by offering personalised learning experiences automated grading and streamlined administration

Benefits of AI in Education:

There are several benefits of AI in education.

1. Typical classrooms run on a traditional curriculum and syllabus schedule are considered out of date. Instead, AI based platforms are put forward as being able to support in analysing students' answers, testing their learning speed, solving any issues in learning complicated lessons and practice problems as per students requirements.
2. AI tutors and chat based learning assistants are giving immediate feedback outside the class hours. They explain concepts, practice questions, summarize chapters and advice students editing. Their answers still need human supervision as generative AI tools can deliver inaccurate and misleading information.
3. The use of AI is steadily expanding in Indian educational environment and in automated repetitive task operations like attendance tracking, test grading, time table marking or handling normal queries about students.
4. The AI automation is recommended in educational sector because AI is viewed as a tool to save time and allows teachers to spend more time on research, lesson planning, mentoring and counselling slow learners. AI

supported predictive analytics is being used to pin point students who are slow learners and drop out. By checking their attendance assessments crores and college activity engagement patters which help educational Institutions to counsel student before he fails or drops out of studies.

5. The AI technology also affects core curriculum and syllabus pattern. AI information processing technologies are changing their businesses. The employers are demanding educational institutions to equip students for AI cyber security, data analysis and digital transformation. Syllabus pattern is being remodelled to include AI basics at school level and AI theoretical learning of AI usage at college level.

Core challenges of AI in education

1. **Challenges of data retention:** AI needs to process large amount of student data including academic admission processes, semester wise results, student's behavioural pattern and bio metric data etc. These are the core areas where hacking, misuse, identity thefts can occur. The use of AI in hacking the entire data may lead to mischievous uses. AI can perpetuate data sets which are predominantly biased and there may be social, historical or ethnic bias.
2. **Reduced critical thinking**: AI can increase dependence of the students on AI programmes and make them lazy and lethargic. There are chances students depending on AI for answers rather than solving the problems and getting information. The use of AI can make students lose their creative skills and problem-solving skills. Students might rely on AI for finding very simple, easy and straight answers instead of reading, researching and referring. Students may lose interest in visiting libraries and reading rooms. Extra reading, Book referring, sources searching etc might be lost.
3. **Over reliance**: Generative AI facilitates copying from other's work such as writing essays, submitting reports, finalising projects and other tasks. AI provides easier pathways to **cut copy paste** methods. with minimal student efforts students can submit their projects and gradually this becomes a habitual practice among students to rely on AI for every academic work. Traditional task of assessment writing and personal scripting long essayed answers fades away. Largely the task of assignment writing which reflected students writing skills becomes copied through pre prepared formats available through AI. This leaves very less space for students to improve their writing and pedagogic skills. Poor pedagogy leads to sluggish and lethargic student groups with very less confidence in exhibiting their academic skills.
4. **Dehumanising education**: AI cannot offer the support, friendship or social or emotional teacher guidance that human teachers do. IN class rooms teachers often offer personal counselling services and guide the slow learners. They positively motivate the learners to apply diverse learning techniques and learn complicated syllabi with easier methods. But AI is a machine which cannot replace human teaching. Gradually learners might become addicted to AI use. Overuse of AI leads to dehumanizing education there by reducing opportunities for academic collaboration, peer learning practices and finally dropping the teacher student personalised connection.
5. **Digital divide and inequitable access:** Entire AI applications and AI tools are completely reliant on the internet technology and Internet related gadgets and AI tech assistance. These AI support applications are easily available to urban learners while rural students fail to access upgraded versions of AI tools and fall behind the urban learners.

This is a direct influence of learning capacities of urban and rural learners. Rural students will not be able to afford technological advancements needed for upgraded AI use. This creates inequitable opportunities in accessing AI tools and will create digital divide. This also causes void in creation of employability and economic opportunities.

6. **Ethical implementation concerns**: AI in education has several ethical challenges. Top among them is the ethical implementation concerns. Both teachers and students need to be aware of AI's decision-making process. Biased algorithms may lead to unjust and unfair outcomes. AI is an automated machinery tool where human emotions and human feelings are out of reach and only AI gadgets are applicable. The loss of ethics is so great that even policy interventions have been not enough to contain the AI. The ethical usage of AI is often widely discussed but few outcomes have become successful. AI has been growing outside it limits and unethical use of AI is increasing.
7. **Fear of Job loss**: Job displacement fears are the most imperative panic among learners. This is hindering the progress of technology as this panic is creating an apprehensive filled atmosphere among higher education students who fear their careers are vanished because of AI usage. Several engineering colleges are fearing the future of several branches of engineering have become completely out of date and AI demands top tech inputs which are not easily affordable by academic institutions. The transformation is also linked with changing demands of organizations. The **World Economic Forum's Future of Jobs Repor**t for 2025 estimates that nearly 40% of the key skills required by workers will change in the next decade. It calls for schools m universities and training providers to rethink their programs to contain AI digital literacy.
8. **Bleak future**- AI tools are developed by private companies who work for profit. The companies in a bid to acquire higher revenues and resources might misuse academic data. The large student data which is restored in AI which is meant for beneficial after use might be used without liability by companies. The appropriate handling of the voluminous data is open to mishandling. Private corporate companies are eyeing on profits fail to check the after-use impact of students' data. Very few policy interventions in checking the companies usage formats might lead to exploitation of data. Educational institutions failing to check the authentic motives of AI tools and data usage might lead their students to a bleak future.

Need for AI competency training for AI lacuna and limitations:

The **World Economic Forum** found that 86% of employers surveyed say **AI Information Processing Technologies** will change their businesses by 2030. Thus education providers to equip students for AI cyber security, data analysis and digital transformation is needed. AI competency is needed for both students and students in usage of AI. An appropriate hand on training and competency building in all levels of AI tools is needed. Policy makers need to frame targeted initiatives which can support educators and learners to understand the core values of human society. There are very few policy interventions which are strongly addressing the AI misuse and ethical collapse of AI. There is a need for providing educators with the upgrade versions of effective AI use. There is also a dire need for guiding students in recognising AI's limitations. AI can be leveraged to provide multiple language options for content via translation and also provide students with access to content despite language barriers an disabilities of speech recognition. Technology based learning environments such as virtual classrooms and automated support systems can be utilised to

provide learning opportunities for areas where qualified teachers are not available. The policies UNESCOs **Ethics of AI Recommendations & AI Act** advocates for transparency human control and fairness ensuring that AI acts as a support system for teachers instead of a replacement.There is a need for bridging access and academic integrity because developing dependable internet connectivity simultaneously with AI resistant evaluations such as oral defences and local projects devices and AI ready platforms ensures schools have equitable access safeguards integrity and stops the digital divide from growing.

Conclusion:

The use of AI in education is very promising but there are significant challenges and constraints which need to be addressed by suitable government policy interventions. The privacy concerns algorithms bias the possibility of reduced critical thinking and lack of access to technology needs policy interventions. AI is feared for making students superficially educated. The AI tools can amplify issues surrounding incapable problem solving and give rise to doorstep customers starving for prompt answers or induce them to fall upon erroneous misleading and prejudicial information.

References:

1. AI in India- Ministry of information and broadcasting, India, 2026
2. Report of the National Digital Mission, Government of India, 2025
3. Joshi Ankur - A Post Colonial Perspective Towards Education in Bharath. The Journal of Business Perspective, Vol. 18, Issue (4), December 2014
4. Aspects of economics. - Atma Nirbhar Bharath. https://deendayalupadhyaya .org
5. Daniel A Gothenburg- Virtual Reality Applications & Implication, 2010

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Historical Perspectives on Social and Economic Transformation

Dr. Babasab Tamadaddi
Lecturer in History, GFGC Raibag
Corresponding Author – Dr. Babasab Tamadaddi
DOI - 10.5281/zenodo.23058595

Abstract:

This research paper offers a historical examination of the social and economic transformations that have shaped human societies from pre-industrial times through the modern era, tracing the complex interplay between economic structures and social change across different periods and regions. The study investigates key historical turning points—including the transition from agrarian to industrial economies, the rise of capitalism, colonial expansion and its economic legacies, and the subsequent shifts toward post-industrial and globalized economies—to understand how economic transformation has consistently reshaped social hierarchies, class relations, labor patterns, gender roles, and institutional structures.

The paper adopts a historical-analytical approach, drawing on economic history and social theory to examine how technological innovations, such as mechanization and later digitalization, have acted as catalysts for broader societal restructuring. Particular attention is given to the Industrial Revolution as a pivotal moment that not only transformed modes of production but also gave rise to new social classes, urbanization patterns, and forms of labor organization, fundamentally altering pre-existing social contracts. The study further explores how economic transformations have historically been accompanied by corresponding shifts in political ideology, from mercantilism to liberalism to various welfare-state models, reflecting society's evolving responses to the disruptions caused by economic change.

Additionally, the research considers the uneven and often contested nature of these transformations, highlighting how economic progress has historically coexisted with social dislocation, inequality, and resistance movements, including labor movements and reform efforts that sought to renegotiate the terms of economic change. By situating contemporary economic and social shifts within this longer historical trajectory, the paper argues that understanding past transformations offers critical insight into present-day challenges of economic inequality, technological disruption, and social change. The study concludes that social and economic transformation is best understood not as a linear progression but as a continuous, contested process shaped by historical contingency and human agency.

Keywords: Industrialization, Economic History, Social Change, Class Structure.

Introduction:

Human societies have never remained static; they are continually remade through the interaction of economic structures and social relations. The history of this interaction is, in many respects, the history of civilization itself—the shift from subsistence agriculture to settled farming communities, the rise of trade networks and market economies, the upheavals of industrialization, and the more recent transitions toward service-based, digital, and globalized economies. Each of these transformations has carried with it profound social consequences, reshaping how people work, where they live, how families are organized, and how power and status are distributed within communities.

This paper undertakes a historical examination of social and economic transformation, tracing the interplay between the two across several pivotal periods: the pre-industrial agrarian order, the Industrial Revolution and the rise of industrial capitalism, the era of colonial expansion and its

lasting economic legacies, and the more recent shifts toward post-industrial, service-oriented, and digitally mediated economies. Rather than treating economic and social change as separate domains, the paper approaches them as mutually constitutive processes: economic transformation reshapes social structures, while social structures—including institutions, ideologies, and collective action—in turn shape the direction and pace of economic change.

The paper is guided by three central questions. First, how have major economic transformations across history reshaped social hierarchies, labor relations, and everyday life? Second, what role have political ideology and state institutions played in mediating the social consequences of economic change? Third, how have ordinary people and organized movements responded to and contested the disruptions caused by economic transformation, and what does this contested history suggest about the nature of social and economic change more broadly? In addressing these questions, the paper argues that social and economic transformation is best understood not as a smooth or inevitable progression but as a historically contingent, deeply contested process, shaped as much by human agency and resistance as by impersonal economic forces.

The significance of this historical inquiry extends well beyond academic interest in the past. Contemporary public discourse is saturated with debates about economic inequality, the social effects of automation, the erosion of stable employment, and the appropriate role of the state in managing market outcomes—debates that, this paper contends, are rarely as unprecedented as they are often presented to be. By tracing the recurring structural patterns through which economic transformation has historically generated social disruption, political contestation, and institutional adaptation, this paper aims to provide a longer historical lens through which to interpret the economic and social challenges of the present, without collapsing the important differences between historical periods or suggesting that historical patterns simply repeat themselves in a deterministic fashion.

Theoretical and Historiographical Framework:

This study draws on the interdisciplinary field of economic history, which examines the long-run relationship between economic systems and social organization, supplemented by insights from historical sociology and political economy. Several theoretical traditions inform the analysis. Classical political economy, associated with thinkers such as Adam Smith and later critiqued by Karl Marx, offers foundational concepts for understanding the relationship between modes of production and social class formation. Marx's analysis of capitalism, in particular, remains influential for understanding how changes in the ownership and organization of productive resources generate corresponding changes in social relations and class conflict.

A second important theoretical strand is Karl Polanyi's concept of the "great transformation," which describes the historically unprecedented disembedding of market activity from broader social relations during the rise of industrial capitalism, and the subsequent societal "double movement" in which communities sought to reassert social protections against the disruptive effects of unregulated markets through political and institutional reform. This framework is particularly useful for understanding the historical relationship between economic liberalization and the rise of welfare-state institutions examined later in this paper.

Finally, the paper draws on historiographical approaches associated with social history and "history from below," which emphasize the experiences and agency of ordinary people—workers, peasants, women, colonized populations—within broader processes of economic transformation, rather than focusing exclusively on elite economic actors, policy decisions, or aggregate statistics. This approach allows the paper to attend

not only to the structural dimensions of economic transformation but also to the lived social experience and contested politics that accompanied it.

Methodology:

This paper adopts a qualitative, comparative-historical methodology, synthesizing secondary historical scholarship and economic history literature to trace patterns of social and economic transformation across several major historical periods and geographical contexts. Rather than presenting new archival research, the study offers an interpretive synthesis designed to identify recurring dynamics and causal relationships across cases that are often studied separately within specialized historical subfields.

The analysis is organized chronologically and thematically. It begins with the pre-industrial agrarian order as a baseline against which subsequent transformations can be measured, before turning to the Industrial Revolution as the paper's central case study of rapid economic transformation and its social consequences. The paper then examines colonial expansion as a parallel and interconnected process of economic transformation, one whose consequences extended unevenly across colonizing and colonized societies alike. Finally, the paper turns to twentieth- and twenty-first-century transformations, including the rise of welfare states, deindustrialization, and digital-economy transitions, situating these more recent shifts within the longer historical trajectory established in earlier sections. Throughout, the analysis pays particular attention to moments of social contestation—labor movements, reform campaigns, and political realignments—treating these not as peripheral reactions to economic change but as constitutive elements of the transformation process itself.

Discussion:

1. The Pre-Industrial Agrarian Order:

Prior to industrialization, most societies were organized around agrarian production, with the great majority of the population engaged in subsistence or semi-subsistence farming. Social structure in this context was typically organized around land ownership and inherited status, with rigid hierarchies separating landowning elites from peasant or tenant farming populations. Economic activity was largely local, constrained by limited transportation and communication technologies, and characterized by relatively low levels of surplus production, which in turn limited the scale of urban development, specialized labor, and long-distance trade.

Nonetheless, pre-industrial economies were far from static. Historians have documented significant regional variation and gradual change within the agrarian order, including the development of proto-industrial "cottage industry" production, the expansion of long-distance mercantile trade networks, and the gradual commercialization of agriculture in some regions well before the onset of full industrialization. These developments laid important groundwork for the more rapid transformations that would follow, demonstrating that industrialization, while transformative, built upon existing economic and social foundations rather than emerging from a wholly static prior order.

2. The Industrial Revolution and the Rise of Industrial Capitalism:

The Industrial Revolution, beginning in Britain in the latter half of the eighteenth century and subsequently spreading across Europe, North America, and eventually much of the world, represents one of the most consequential episodes of economic and social transformation in human history. Technological innovations in textile production, steam power, and later in iron and steel manufacturing dramatically increased productive capacity, enabling forms of mass production previously unattainable under agrarian or artisanal modes of production.

These technological changes generated equally profound social consequences. The concentration of production within factories accelerated urbanization, drawing large populations

from rural agricultural areas into rapidly growing industrial cities, often under conditions of severe overcrowding, poor sanitation, and inadequate housing. A new industrial working class emerged, whose members sold their labor for wages under conditions frequently characterized by long hours, dangerous working environments, and minimal job security, in contrast to the more paternalistic—if also exploitative—relations that had often characterized agrarian labor arrangements. Simultaneously, industrialization gave rise to an increasingly influential industrial and commercial middle class, whose growing economic power gradually translated into demands for political representation and reform, reshaping the political landscape of industrializing nations.

The social dislocations produced by industrialization were not passively accepted. The nineteenth century witnessed the emergence of organized labor movements, trade unions, and various reformist and radical political movements seeking to address the harsh conditions of industrial labor, including campaigns for shorter working hours, improved workplace safety, and the right to collective bargaining. These movements, along with periodic economic crises and social unrest, gradually pressured governments to introduce factory legislation, public health reforms, and other regulatory interventions, illustrating how economic transformation and social contestation operated as mutually shaping processes rather than a one-directional imposition of economic change upon a passive society.

3. Colonial Expansion and Its Economic and Social Legacies:

The economic transformations of the industrializing West were closely intertwined with processes of colonial expansion, which supplied raw materials, captive markets, and, in many contexts, coerced or enslaved labor that fueled industrial growth in colonizing nations. This paper considers colonial expansion as a parallel process of economic and social transformation whose consequences, while frequently devastating for colonized populations, are too often treated as separate from mainstream narratives of industrial and economic development.

Colonial economic policy frequently involved the deliberate restructuring of colonized societies' economic activities to serve the needs of colonizing powers, including the imposition of cash-crop monocultures, the disruption of pre-existing local trade networks and artisanal production, and the extraction of natural resources with limited reinvestment in local infrastructure or human development. These interventions produced lasting social transformations within colonized societies, including the displacement of traditional land tenure systems, the creation of new labor hierarchies often organized along racial lines, and enduring patterns of economic dependency that have shaped post-colonial development trajectories well into the contemporary period. Understanding the history of social and economic transformation therefore requires attending not only to the industrializing societies of Western Europe and North America but also to the deeply unequal global economic relationships through which that industrialization was, in significant part, enabled.

4. Ideological Responses: From Mercantilism to Liberalism to the Welfare State:

Economic transformation across the modern period has been consistently accompanied by evolving political and ideological frameworks for understanding and managing the relationship between markets and society. Mercantilist economic policy, dominant in early modern Europe, emphasized state control over trade and the accumulation of national wealth through protectionist measures. This gradually gave way, particularly through the eighteenth and nineteenth centuries, to classical liberal economic ideology, which emphasized free trade, minimal state intervention, and the self-regulating capacity of markets—an ideological shift that both reflected and reinforced the economic interests of an increasingly powerful industrial and commercial class.

The severe social dislocations associated with unregulated industrial capitalism, however, generated sustained political pressure for a renegotiation of the relationship between market and state. This pressure culminated, particularly across the late nineteenth and twentieth centuries, in the gradual development of welfare-state institutions—including social insurance programs, public education, labor protections, and progressive taxation—designed to mitigate the social risks and inequalities generated by market economies while preserving their fundamental productive dynamism. This historical trajectory, from mercantilism through liberalism to the welfare state, illustrates the broader pattern identified throughout this paper: economic transformation generates social disruption, which in turn generates political and institutional responses that reshape the subsequent trajectory of economic development.

5. Twentieth- and Twenty-First-Century Transformations: Deindustrialization and the Digital Economy:

The latter half of the twentieth century witnessed a further major economic transformation in many advanced industrial economies: the shift from manufacturing-based industrial economies toward service-based and, increasingly, knowledge- and digitally-based economic structures. This process of deindustrialization, driven by automation, global trade liberalization, and the relocation of manufacturing production to lower-wage regions, produced significant social consequences in formerly industrialized regions, including the decline of traditional working-class communities built around manufacturing employment, rising regional economic inequality, and the erosion of the stable, unionized employment relationships that had characterized much of the mid-twentieth-century industrial economy.

More recently, the rise of digital technologies and platform-based economic models has introduced further transformations, including new forms of flexible and precarious "gig" employment, the increasing concentration of economic value within technology firms, and ongoing debates about the social implications of automation and artificial intelligence for future labor markets. These contemporary transformations echo, in important respects, the disruptions associated with earlier historical transitions, including concerns about labor displacement, rising inequality, and the adequacy of existing social and political institutions to manage the social consequences of rapid economic change—suggesting that historical perspective offers genuine analytical value for understanding contemporary economic transformation, rather than being a matter of purely antiquarian interest.

6. Contestation, Agency, and the Uneven Nature of Transformation:

A recurring theme across each of the historical episodes examined in this paper is that economic transformation has never proceeded as a smooth, uncontested, or evenly distributed process. Each major transformation examined here—industrialization, colonial expansion, the construction of welfare states, and deindustrialization—has generated significant social resistance, contestation, and organized collective action, from nineteenth-century labor movements to twentieth-century anti-colonial independence movements to contemporary movements addressing economic inequality and the social consequences of automation.

This pattern of contestation underscores an important historiographical point: economic transformation should not be understood as an impersonal, purely structural process to which societies passively adapt, but rather as a process actively shaped by human agency, organized political action, and ongoing struggles over the distribution of economic benefits and burdens. Recognizing this contested and uneven character of historical transformation offers an important corrective to more deterministic accounts of economic change and provides valuable historical grounding for understanding contemporary debates about how societies might collectively shape, rather

than simply endure, the economic transformations of the present and future.

Limitations and Areas for Further Inquiry:

This study, as a broad historical synthesis, necessarily involves certain limitations. Its comparative scope, while useful for identifying long-run patterns, sacrifices some of the depth and specificity that more focused regional or period-specific studies can offer. Additionally, the paper's reliance on secondary historical scholarship, rather than original archival research, means that its conclusions are shaped by existing historiographical debates and emphases within the field of economic history, which itself has evolved considerably over time and continues to be characterized by significant methodological and interpretive disagreement. Future research might productively extend this study through more focused regional case studies, particularly of economic transformation processes outside Western Europe and North America, or through more sustained engagement with quantitative economic history methods capable of testing some of the broader interpretive claims advanced here.

Conclusion:

This paper has traced the historical relationship between economic and social transformation across several major periods, from the pre-industrial agrarian order through the Industrial Revolution, colonial expansion, the construction of welfare-state institutions, and contemporary processes of deindustrialization and digital-economy transition. Across each of these episodes, a consistent pattern emerges: economic transformation generates significant social disruption and inequality, which in turn generates political contestation and institutional reform, which subsequently reshapes the trajectory of further economic development. This recursive relationship between economic change and social response suggests that social and economic transformation is best understood not as a linear, inevitable process of progress but as a continuous, historically contingent, and deeply contested one, shaped as much by collective human agency and political struggle as by impersonal economic or technological forces.

Understanding this longer historical trajectory offers valuable perspective for addressing contemporary challenges of economic inequality, technological disruption, and social change. Just as earlier generations responded to the disruptions of industrialization and market liberalization through organized labor movements, reform campaigns, and the eventual construction of new social and political institutions, contemporary societies face comparable choices in determining how the benefits and burdens of ongoing economic transformation—including automation, globalization, and digital-economy restructuring—will be distributed and managed. The historical record examined in this paper suggests that the outcomes of such transformations are not predetermined but remain open to the same kind of collective agency and institutional innovation that has shaped social and economic development throughout the modern era.

References:

1. Hobsbawm, E. J. (1996). The age of revolution: 1789–1848. Vintage Books.
2. Hobsbawm, E. J. (1996). The age of capital: 1848–1875. Vintage Books.
3. Landes, D. S. (1998). The wealth and poverty of nations: Why some are so rich and some so poor. W. W. Norton & Company.
4. Marx, K. (1990). Capital: A critique of political economy (Vol. 1) (B. Fowkes, Trans.). Penguin Classics. (Original work published 1867)
5. North, D. C. (1990). Institutions, institutional change and economic performance. Cambridge University Press.
6. Piketty, T. (2014). Capital in the twenty-first century (A. Goldhammer, Trans.). Harvard University Press.
7. Polanyi, K. (2001). The great transformation: The political and economic origins of our

time (2nd ed.). Beacon Press. (Original work published 1944)

8. Thompson, E. P. (1963). The making of the English working class. Victor Gollancz.
9. Wallerstein, I. (1974). The modern world-system: Capitalist agriculture and the origins of the European world-economy in the sixteenth century. Academic Press.
10. Williams, E. (1994). Capitalism and slavery. University of North Carolina Press. (Original work published 1944)

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Understanding the Relationship Between the Past, The Present and The Community: A Historical Perspective

Shri. M. N. Sangolli
Lecturer, Department of History,
K.L.E. Society's S.V.S. Bellubbi Arts & Commerce College, Saundatti Belagavi District, Karnataka
Corresponding Author – Shri. M. N. Sangolli
DOI - 10.5281/zenodo.23058617

Abstract:

History is the study of the human past and its relationship with the development of society. The past is not completely separate from the present. Many social institutions, cultural traditions, customs, occupations, beliefs and community practices of the present have developed through historical processes. Therefore, understanding the past is important for understanding contemporary society.

The community plays an important role in maintaining the connection between the past and the present. Historical memories, oral traditions, folk songs, festivals, monuments, family records, local customs and traditional knowledge are important sources for understanding community history. At the same time, the present generation interprets the past according to its contemporary needs and experiences. Thus, the relationship between the past, present and community is continuous and dynamic.

This paper attempts to examine the relationship between the past and present and to understand the role of communities in preserving historical knowledge and cultural heritage. It also highlights the importance of local history and oral history in understanding social change. The paper argues that the study of community history can help preserve cultural heritage, strengthen historical awareness and provide a better understanding of contemporary society. In the Indian context, the study of local and community history is particularly important because of the country's rich cultural and historical diversity.

Keywords: Past, Present, Community, History, Local History, Oral History, Historical Memory, Cultural Heritage, Social Change.

Introduction:

History is an important field of social science that helps us understand the development of human society. It studies the activities and experiences of people in the past and explains how societies changed over different periods. History is not only the study of kings, rulers, wars and political events. It also includes the lives of ordinary people, their occupations, traditions, customs, beliefs, family life, education and cultural practices.

The present society has developed from the past. Many institutions and practices that we see today have historical roots. Languages, festivals, traditional occupations, social customs, educational institutions, religious practices and cultural traditions have been shaped by the experiences of earlier generations.

The relationship between the past and present can be understood through the concepts of **continuity and change**. Some traditions and practices continue from one generation to another, while others change according to social, economic, political and technological developments.

The community acts as an important link between the past and present. Communities preserve their history through oral traditions, memories, monuments, festivals, folk songs, photographs, family documents and traditional practices. Elderly members of a community often possess valuable

knowledge about the changes that have taken place during their lifetime.

In the modern period, rapid urbanisation, migration, technological development and changing lifestyles have affected traditional community life. As a result, some forms of local historical knowledge and cultural traditions are gradually disappearing.

Therefore, it is important to document and study community history. Local history and oral history can provide valuable information about ordinary people and their experiences. They can also help students and researchers understand the relationship between historical developments and contemporary society.

Objectives of The Study:

The present study has the following objectives:

1. To understand the relationship between the past and the present.
2. To examine the role of history in understanding contemporary society.
3. To study the role of communities in preserving historical memory.
4. To understand the importance of local history in historical research.
5. To examine the importance of oral traditions and oral history.
6. To study the relationship between historical heritage and community identity.
7. To understand the impact of social and technological changes on community traditions.
8. To highlight the importance of preserving local historical and cultural heritage.
9. To suggest ways of involving educational institutions and communities in preserving history.

Methodology:

The present paper is mainly based on a **descriptive and analytical methodology**. The study uses both primary and secondary sources wherever relevant.

1. Primary Sources:

Primary sources that can be used for studying community history include:

- Oral interviews
- Personal memories
- Family documents
- Old photographs
- Local records
- Inscriptions
- Historical monuments
- Local newspapers
- Government records
- Institutional records

Oral interviews with elderly members of communities are particularly useful for understanding changes in local society.

2. Secondary Sources:

Secondary sources include:

- Books on Indian history
- Research articles
- Journals
- Reference books
- Historical studies
- Books on local and cultural history

3. Method of Analysis:

The collected information is studied through historical and analytical methods. Different sources are compared to understand continuity and change in community life.

Special attention is given to the relationship between:

Past → Historical Memory → Community → Present Society

The study also considers the importance of local history and oral history in understanding contemporary social conditions.

Discussion:

The relationship between the past, the present and the community is very important for understanding human society. The present society is not separate from the past; rather, it is the result of many historical developments. The customs, traditions, social institutions, occupations, cultural

practices and beliefs that we see in society today have developed through a long process of historical change. History therefore helps us understand how communities have developed and how their social and cultural life has changed over time. At the same time, the present generation also looks at the past according to its own experiences and needs. Thus, the relationship between the past and present is continuous and dynamic, involving both continuity and change.

The community plays an important role in maintaining this relationship. Historical knowledge is preserved not only in books and official records but also in the memories and experiences of ordinary people. Families and communities preserve their past through oral traditions, folk songs, stories, festivals, customs, photographs, family documents, monuments and traditional practices. Elderly members of a community can provide valuable information about changes that have taken place during their lifetime. Oral history is therefore an important method of understanding community life, particularly where written records are limited. However, oral memories need to be compared with other historical sources because individual memories may sometimes be incomplete or influenced by personal experiences.

Local history is another important way of understanding the relationship between the past and the community. The history of a village, town or region helps us understand the experiences of ordinary people and their contribution to social development. The history of local occupations, agriculture, education, markets, religious institutions, festivals, migration and social organisations can reveal how communities have changed over time. Local history is not separate from national history; rather, the history of a nation is made up of the experiences of different regions and communities. In this context, the study of local history in places such as Saundatti and the wider Belagavi region can provide valuable information about cultural traditions, historical places, educational development, occupations and social change.

The relationship between the past and present can also be understood through cultural heritage. Historical monuments, buildings, sculptures, inscriptions and archaeological remains represent the tangible heritage of a community, while folk songs, traditional knowledge, languages, festivals, customs and performing arts represent its intangible heritage. These forms of heritage connect the present generation with earlier generations and contribute to a sense of community identity. However, rapid modernisation, urbanisation, migration, technological development and changing lifestyles are affecting many traditional practices. Some local traditions, occupations and forms of oral knowledge are gradually disappearing. Therefore, documenting and preserving community history has become increasingly important.

Educational institutions can play an important role in this process. Schools and colleges can encourage students to study the history of their villages and towns, interview elderly people, collect old photographs and documents, visit historical places and prepare local-history projects. Modern digital technology can also help preserve historical information through digital photographs, audio recordings, video interviews and online archives. At the same time, historical information available through digital platforms should be carefully verified because not all information available online is reliable. Historians and researchers therefore have an important responsibility to collect evidence, compare different sources and present historical information carefully. Community participation is equally important because local people are the custodians of much of their own historical and cultural knowledge. Understanding the relationship between the past, present and community can therefore help preserve heritage, understand social change and develop greater awareness of the historical experiences that have shaped contemporary society.

Findings:

The present study has identified the following major findings:

1. Past and Present are Closely Connected: The present social, cultural and economic conditions of communities have developed through historical processes.

2. Communities Preserve Historical Knowledge: Communities preserve their past through memories, traditions, monuments, family records and cultural practices.

3. Local History is Important: The study of villages, towns and regions provides a better understanding of the experiences of ordinary people.

4. Oral History is Valuable: Oral history provides information about everyday life and experiences that may not be available in written records.

5. Historical Memory Connects Generations: Community and family memories help transfer knowledge from older generations to younger generations.

6. Heritage Provides Historical Continuity: Monuments, traditions, festivals, folk arts and traditional knowledge connect present communities with their past.

7. Social Change Influences Community Traditions: Modern education, urbanisation, migration, technology and economic development have changed traditional community life.

8. Educational Institutions Can Make an Important Contribution: Schools and colleges can document and preserve local history through research projects, interviews and field studies.

9. Historical Evidence Must be Critically Examined: Oral traditions and memories are valuable, but they should be compared with other historical sources.

10. Community Participation is Necessary: Historical preservation becomes more effective when local people participate in documenting and protecting their heritage.

Suggestions:

Based on the study, the following suggestions can be made:

1. Local-history research should be encouraged in colleges and universities.
2. Students should be trained in oral-history methods so that they can interview elderly members of communities.
3. Local historical monuments should be documented through photographs, descriptions and historical records.
4. Old photographs, documents and family records should be digitised for future generations.
5. Colleges should organise heritage walks and field visits to historical places.
6. Local museums and community archives should be encouraged to preserve historical materials.
7. Elderly community members should be involved in historical projects because they possess valuable memories and knowledge.
8. Traditional arts, crafts, folk songs and oral traditions should be documented before they disappear.
9. Students should undertake village-history projects as part of their academic activities.
10. Historical information available on digital platforms should be verified using reliable sources.
11. Community participation should be encouraged in heritage conservation.
12. History education should connect local history with national history, helping students understand the larger historical context.
13. Research on women, workers, farmers, artisans and other ordinary people should be encouraged, so that community history becomes more inclusive.
14. Educational institutions should create digital local-history archives containing photographs, interviews, documents and research papers.

Conclusion:

The relationship between the past, present and community is continuous and important. The present is the result of historical developments, while the understanding of the past is also influenced by the experiences and needs of the present.

The community acts as an important bridge between the past and present. Through family memories, oral traditions, festivals, folk songs, monuments, traditional occupations and cultural practices, communities preserve valuable historical knowledge.

The study of local history is particularly important because it brings history closer to ordinary people. It helps us understand the experiences of villages, towns and regions and shows how social, economic and cultural changes have affected community life.

Oral history is also an important method for documenting community experiences. However, oral evidence should be examined critically and compared with written, archaeological and other sources.

In contemporary India, rapid modernisation, migration, urbanisation and technological development are changing traditional community life. Therefore, documenting local history and cultural heritage has become increasingly important.

Educational institutions can play a major role in this process. Colleges and universities can encourage students to conduct oral-history projects, document local monuments, collect old photographs, interview elderly people and study local traditions.

Ultimately, history is not simply a record of what happened in the past. It is a means of understanding how the past has shaped the present. The community provides an important connection between these two periods. Understanding this relationship can help preserve cultural heritage, promote historical awareness and provide a deeper understanding of contemporary society.

Thus, the study of "the past, the present and the community" is highly relevant to historical research and to the broader study of contemporary India.

References:

1. Berkhofer, R. F. (1995). *Beyond the great story: History as text and discourse*. Harvard University Press.
2. Carr, E. H. (1961). *What is history?* Macmillan.
3. Guha, R. (2007). *India after Gandhi: The history of the world's largest democracy*. HarperCollins.
4. Majumdar, R. C. (Ed.). (1970). *History and culture of the Indian people*. Bharatiya Vidya Bhavan.
5. Munslow, A. (2006). *Deconstructing history*. Routledge.
6. Nora, P. (1989). Between memory and history: Les lieux de mémoire. *Representations, 26*, 7–24.
7. Thompson, P. (2000). *The voice of the past: Oral history* (3rd ed.). Oxford University Press.
8. Wright, P. (1985). *On living in an old country: The national past in contemporary Britain*. Verso.
9. Ranger, T., & Hobsbawm, E. (Eds.). (1983). *The invention of tradition*. Cambridge University Press.
10. Sharma, R. S. (2005). *India's ancient past*. Oxford University Press.
11. Singh, U. (2008). *A history of ancient and early medieval India: From the Stone Age to the 12th century*. Pearson Longman.
12. Srinivas, M. N. (1966). *Social change in modern India*. University of California Press.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

The Impact of History, Heritage, Culture and Identity on Tourism in Dharwad District: A Study

Mangala Hiremath
Research Scholar, Department of History,
Srinivas University, Mangalore.
Corresponding Author – Mangala Hiremath
DOI - 10.5281/zenodo.23058638

Abstract:

Dharwad district occupies a distinctive position in the historical, cultural and educational landscape of Karnataka. Its geographical location between the Malnad region and the Deccan plateau, historical association with several ruling dynasties, religious institutions, educational centres, literary traditions and Hindustani classical music have contributed to the formation of a distinctive regional identity. The district has historical associations with the Chalukyas, Rashtrakutas, Vijayanagara Empire, Adil Shahis, Mysore rulers and the Peshwas, followed by the British period. These historical layers are reflected in temples, mathas, religious centres, architectural monuments, cultural practices, literature, music, traditional crafts and cuisine.

Tourism in Dharwad is therefore not limited to visiting physical sites; it also involves experiencing the living heritage and cultural identity of the region. Places such as Siddharoodha Math, Murugha Math, Chandramouleshwara Temple, Tamboor Basavanna Temple and Amruteshwara Temple represent different dimensions of religious and architectural heritage. Dharwad's contribution to Hindustani music and Kannada literature further strengthens its cultural tourism potential. The district is also associated with Dharwad Pedha, Navalgund Dhurrie and Kasuti embroidery, which connect tourism with local livelihoods and intangible cultural heritage.

This article examines how history, heritage, culture and regional identity influence tourism in Dharwad district and argues that their systematic conservation, interpretation and promotion can contribute to sustainable and community-oriented tourism development.

Keywords: History; Heritage; Culture; Identity; Tourism; Dharwad District; Cultural Tourism; Heritage Tourism; Sustainable Tourism; Karnataka.

Introduction:

Tourism is increasingly understood not merely as travel for recreation but as an important means of experiencing history, culture, heritage and regional identity. Historical monuments, religious institutions, traditional arts, music, literature, food, festivals and local customs create distinctive tourism experiences. In this context, Dharwad district presents an important case for studying the relationship between historical heritage and tourism.

Dharwad has historically functioned as a geographical and cultural gateway between the Malnad and the Deccan plateau. The district administration records a long historical sequence involving several dynasties and political powers, including the Chalukyas, Rashtrakutas, Vijayanagara rulers, Adil Shahis, Mysore kingdom and Peshwas, followed by British rule. Such historical transitions have contributed to the formation of a multicultural social environment.

The district is also recognised for its educational and cultural significance. Dharwad is associated with Karnataka University and numerous educational institutions, while its cultural identity has been strengthened by prominent literary and musical personalities. The official district profile

identifies figures such as D. R. Bendre, Gangubai Hangal, Mallikarjun Mansur, Bhimsen Joshi, Basavaraj Rajguru and others as important contributors to literature and music.

Consequently, tourism in Dharwad can be studied through four interconnected dimensions: history, heritage, culture and identity. Together, these dimensions create a distinctive destination image and provide opportunities for heritage, religious, cultural, educational and rural tourism.

Historical Background and Tourism:

The historical character of a region strongly influences its tourism potential. Dharwad's historical development reflects the interaction of different political, religious and cultural traditions. Archaeological and historical remains, temples, religious institutions and old settlements provide tangible evidence of this past.

The district administration identifies several historical and religious attractions. The Chandramouleshwara Temple at Unkal is associated with Chalukyan architecture, while the Amruteshwara Temple at Annigeri dates to the eleventh century. Shambulingeshwara Temple at Kundgol and Tamboor Basavanna Temple at Kalghatagi are also listed among the district's historic and religious sites.

These sites can function as educational resources as well as tourism attractions. Historical tourism enables visitors to understand architectural styles, religious traditions, political history and social change. Proper interpretation through information boards, museums, heritage walks, trained guides and digital documentation can make these historical resources more meaningful to visitors.

Heritage and Tourism:

Heritage includes both tangible and intangible elements. Tangible heritage consists of temples, mathas, buildings, monuments, traditional settlements and objects, while intangible heritage includes music, literature, oral traditions, crafts, festivals, food practices and local knowledge.

Dharwad has a wide range of heritage resources. Religious institutions such as Siddharoodha Math and Murugha Math form part of the region's religious and cultural landscape. Such institutions are not merely religious spaces; they may also represent educational, social and cultural traditions.

Heritage tourism can therefore provide opportunities for visitors to engage with both physical structures and living traditions. However, tourism development should not reduce heritage to commercial display. Conservation, authenticity, local participation and respect for community traditions are essential for responsible heritage tourism.

Culture and Tourism:

Culture is one of Dharwad's most significant tourism resources. The district has a recognised association with Hindustani classical music and Kannada literature. The establishment of the Dr. Gangubai Hangal Gurukul demonstrates the continuing institutional importance of Hindustani music in the region.

Dharwad's literary identity is strongly associated with D. R. Bendre, while its musical heritage is connected with renowned artists such as Gangubai Hangal, Mallikarjun Mansur, Bhimsen Joshi and Basavaraj Rajguru.

Music festivals, literary events, cultural programmes, heritage walks and educational tourism can transform this cultural capital into meaningful tourism experiences. Such activities can also benefit local artists, guides, artisans, hospitality providers and small businesses.

Food and traditional crafts constitute another important dimension of cultural tourism. Dharwad Pedha has a long local history and has received a Geographical Indication (GI) tag. Navalgund Dhurrie and Kasuti embroidery are also associated with the cultural identity of the region.

Regional Identity and Tourism:

Regional identity refers to the sense of belonging and distinctive characteristics associated with a particular geographical community. Dharwad's identity has developed through its history, language, literature, music, religious traditions, education, food and social interactions.

Tourism can both communicate and strengthen this identity. When visitors experience Dharwad's music, literature, traditional food, religious centres and local crafts, they encounter aspects of the region's identity. At the same time, tourism creates opportunities for local communities to preserve and communicate their cultural traditions.

The challenge is to maintain a balance between tourism promotion and cultural integrity. Commercialisation without adequate conservation may weaken the authenticity of heritage. Therefore, tourism planning should involve local communities, cultural organisations, heritage experts and government institutions.

Socio-Economic Impact of Tourism:

Tourism based on history and culture can contribute to local economic development. Heritage sites attract visitors who may spend on transportation, accommodation, food, handicrafts, entrance services, guiding and local products. This creates direct and indirect employment opportunities.

Cultural tourism can particularly support small-scale producers and artisans. Traditional products such as Dharwad Pedha, Navalgund Dhurrie and Kasuti-related products provide examples of how cultural resources can be connected with local economic activity.

Tourism can also encourage investment in infrastructure, sanitation, transportation, interpretation facilities and heritage conservation. However, the economic benefits need to be distributed fairly so that local communities remain active participants rather than merely service providers.

Major Challenges:

Despite its rich resources, Dharwad's heritage tourism faces several challenges:

1. Inadequate conservation and maintenance of some heritage structures.
2. Limited interpretation and documentation of local historical sites.
3. Insufficient integration of cultural sites into tourism circuits.
4. Need for better visitor amenities and information facilities.
5. Risk of commercialisation and loss of cultural authenticity.
6. Limited participation of local communities in tourism planning.
7. Need for stronger digital promotion and heritage documentation. Addressing these issues requires an integrated tourism strategy based on conservation, community participation, education and sustainable development.
8. Suggestions for Sustainable Tourism Development

Dharwad's historical and cultural resources can be strengthened through:

- Development of integrated heritage tourism circuits.
- Preparation of documented heritage inventories.
- Digital archives and virtual interpretation of important sites.
- Heritage walks connecting temples, mathas, historical buildings and cultural institutions.
- Promotion of music and literary tourism.
- Support for local artisans and traditional food producers.
- Training programmes for local tourist guides.
- Improved signage, sanitation, transport and visitor facilities.
- Community participation in heritage management.

- Collaboration between universities, local government, tourism authorities and cultural organisations.

Karnataka's tourism policy has identified Dharwad among the state's focus tourism destinations, indicating its recognised tourism-development potential.

Conclusion:

History, heritage, culture and identity constitute interconnected foundations of tourism in Dharwad district. The district's historical associations, architectural heritage, religious institutions, literary traditions, Hindustani classical music, traditional crafts and cuisine collectively create a distinctive cultural landscape. Official tourism sources also present Dharwad as a destination associated with music, learning, culture and heritage.

The future development of tourism in Dharwad should therefore move beyond isolated site-based tourism towards an integrated model that connects historical places with living culture and local communities. Conservation and tourism should be treated as complementary objectives. Sustainable tourism can help preserve heritage while generating educational, cultural and economic opportunities for local communities.

Thus, the relationship between history, heritage, culture, identity and tourism is dynamic. When appropriately documented, conserved and interpreted, Dharwad's heritage can contribute significantly to cultural understanding, local development and sustainable tourism.

Bibliography:

1. Dharwad District Administration. District Profile: Historical Background and Cultural Characteristics. Government of Karnataka.
2. Dharwad District Administration. Culture & Heritage. Government of Karnataka.
3. Dharwad District Administration. Tourism and Tourist Places. Government of Karnataka.
4. Karnataka Tourism. Dharwad: Music, Learning and Quiet Charm. Government of Karnataka.
5. Government of Karnataka, Department of Tourism. Karnataka Tourism Policy 2020–26.
6. Timothy, D. J. Cultural Heritage and Tourism: An Introduction. Channel View Publications.
7. Smith, M. K. Issues in Cultural Tourism Studies. Routledge.
8. UNESCO. Culture and Sustainable Tourism. United Nations Educational, Scientific and Cultural Organization.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Water Disputes and Agrarian Transformation: The Kalasa–Banduri Project in Historical Perspective

Mr. Rangappa Dasar
Research Scholar (History),
Srinivas University Mangalore
Corresponding Author – Mr. Rangappa Dasar
DOI - 10.5281/zenodo.23058681

Abstract:

Water disputes in India are not merely legal conflicts over river water sharing; they are catalysts of agrarian transformation. This article examines the Kalasa–Banduri Nala Diversion Project on the Mahadayi / Mhadei river basin as a case study of this process. The project, designed to divert 7.56 TMC of water from Kalasa and Banduri tributaries to the Malaprabha river to provide drinking water to the drought-prone districts of Dharwad, Belagavi, Gadag and Bagalkot in North Karnataka, has been pending for over 35 years due to an interstate dispute involving Karnataka, Goa and Maharashtra.

This study traces the historical evolution of the dispute from 1989 to 2026 and its impact on agrarian structure. It argues that prolonged delay and legal entanglement has led to three transformations: (a) shift from irrigated to rain-fed distress agriculture, (b) rise of a new political consciousness among dryland farmers, and (c) transformation of a local water project into a regional identity movement. Based on Tribunal awards, archival records, government documents and field observations in Nargund and Navalgund, the paper concludes that Kalasa-Banduri represents a classic case of how water scarcity and federal water governance failure reshape agrarian society.

Keywords: Kalasa-Banduri, Mahadayi Water Dispute, Agrarian Transformation, North Karnataka, Water Federalism, Farmers Movement.

Introduction:

Raichur, Dharwad and Belagavi districts lie in the Krishna basin's semi-arid zone. Average rainfall is 450-650 mm, while Goa, at the source of Mahadayi, receives 3500 mm. This ecological asymmetry is the root of the dispute.

The Mahadayi river originates in Bhimgad forest in Belagavi district of Karnataka, flows 35 km in Karnataka, 52 km in Goa as Mandovi, and joins Arabian Sea. For Goa, it is a lifeline for drinking water, ecology and navigation. For Karnataka, its tributaries Kalasa and Banduri flowing in Khanapur taluk are surplus water that can solve the drinking water crisis of four districts.

Research Objectives and Methodology:

Objectives:

1. To trace the historical evolution of Kalasa-Banduri Project and Mahadayi dispute
2. To analyze the impact of the delay on agrarian structure in beneficiary districts
3. To understand the link between water dispute and agrarian mobilization

Methodology:

Historical-analytical method.

Primary Sources:

- Mahadayi Water Disputes Tribunal Award 2018,
- CWC Reports, Karnataka Neeravari Nigam Ltd documents.

Secondary:

- Prajavani, Vijaya Karnataka, Deccan Herald archives 2006-2024.
- Field interaction with leaders of Kalasa-Banduri Horata Samiti.

Literature Review:

Iyer 2007 and Joy et al. 2008 argue Indian water disputes are political, not just hydrological. Briscoe and Malik 2006 highlight federal failure in water governance. Studies on Cauvery dispute by Richards and Singh show how water conflicts create linguistic and regional identities. However, Mahadayi dispute is less studied academically. Ballari and Chouhan 2019 provide technical overview but lack agrarian perspective. This paper fills the gap by linking water law with agrarian history.

Historical Evolution of Kalasa-Banduri Project:

Phase I: Conception 1989-2000:

- Conceived by Karnataka in 1989. Foundation laid by then Chief Minister S.R. Bommai.
- Project cost Rs. 312 crores initially. Goa approached Centre, CWC directed Karnataka to stop work.

Phase II: Legalisation of Dispute 2001-2010:

- 2002: Goa files petition in Supreme Court under Interstate Water Disputes Act 1956.
- 2006: Karnataka starts work in non-forest area.
- 2010: UPA government constitutes Mahadayi Water Disputes Tribunal headed by Justice J.M. Panchal.

Phase III: Tribunal and Mass Struggle 2010-2018:

- Longest dharna in Karnataka's history – 1,201 days at Nargund.
- Farmers, led by Vijay Kulkarni, did Bengaluru Chalo Padayatra. On 30 July 2015, North Karnataka bandh was total.

Tribunal proceedings: Goa argued diversion will destroy Mhadei Wildlife Sanctuary and impact Western Ghats ecology. Karnataka argued drinking water is fundamental right under Article 21 and needs only 7.56 TMC out of 200 TMC total flow.

Phase IV: Post-Award Period 2018-2026:

MWDT Award on 14 August 2018 allocated:

- Goa: 24 TMC
- Karnataka: 13.42 TMC (including 3.9 TMC for Kalasa-Banduri for drinking water, 5.5 TMC for power generation within Karnataka)
- Maharashtra: 1.33 TMC
- Karnataka demanded modification for 7.56 TMC. In 2022 CWC approved DPR for 3.9 TMC. Work started in 2023 but stopped again due to non-clearance under Forest Conservation Act and Wildlife Protection Act in Bhimgad forest.

Agrarian Transformation in The Command Area:

A. From Commercial Agriculture to Distress Agriculture:

Dharwad, Gadag, Bagalkot were once known for cotton and maize. Due to Malaprabha reservoir failure in 15 out of last 20 years, farmers shifted to low-yield jowar and pulse. Irrigated area fell from 24% in 1990 to 17% in 2020 in Navalgund taluk.

B. Agrarian Distress and Migration:

According to Karnataka Economic Survey, farmer suicide in Dharwad-Gadag belt increased 32% between 2013-2016, coinciding with peak water scarcity. Seasonal migration to Goa and Pune increased.

C. Drinking Water Crisis as Agrarian Crisis:

In 2016, 132 villages in Dharwad supplied water once in 15 days through tankers. Women spent 3-4 hours daily fetching water. Agriculture labour became scarce as women focused on water collection.

Water Dispute as A Driver of New Agrarian Politics:

The delay transformed farmers' consciousness.

1. **De-politicized to Politicized Movement:** Initially led by farmers, later supported by all castes, lawyers, students, traders. It became a movement for North Karnataka self-respect.
2. **New Leadership:** Non-party leadership like Kalasa-Banduri Horata Samiti challenged traditional party politics. Leaders emerged from small farmer background, not dominant landlords.
3. **Ecological vs Equity Debate:** Goa's argument of Western Ghats protection is valid ecologically, but Karnataka farmers ask: Is ecology only Goa's concern? Can 3.9 TMC drinking water destroy ecology when Goa uses 24 TMC?

This debate shows how environmental law is used in interstate disputes.

Discussion: Federalism And Water Justice:

The Indian federal system under Articles 262 and 262 provides Tribunal mechanism but no time-bound implementation. Mahadayi Tribunal took 8 years for award, 6 more years for notification. This delay is costly for farmers.

The case proves that under Article 21, drinking water should get priority over ecological tourism concerns, as held by Supreme Court in _State of Karnataka vs State of Goa_ observations.

Conclusion:

The Kalasa-Banduri project is not just an engineering project. It is a lens to understand agrarian transformation in semi-arid Karnataka. Thirty-five years of waiting has transformed:

- The economy: From surplus to distress
- The society: From caste-divided villages to united water movement
- The politics: From local issue to state and central election issue

Until water reaches Malaprabha, the agrarian transformation will remain incomplete and distress will continue. The historical lesson is that delayed water justice is denied agrarian justice.The future research should focus on comparative study of Mahadayi with Cauvery and Krishna disputes to understand how tribunals impact agrarian change.

References:

1. Mahadayi Water Disputes Tribunal Award, Government of India, 2018.
2. Iyer, R.R. _Towards Water Wisdom. Sage, 2007.
3. Government of Karnataka, _Detailed Project Report of Kalasa-Banduri, KNNL, 2012.
4. Joy, K.J. et al. _Water Conflicts in India. Routledge, 2008.
5. Karnataka Economic Survey 2023-24.
6. Field Notes: Interview with Vijay Kulkarni, Navalgund, 2024.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

History, Heritage, Culture, and Identity: Rethinking Historical Memory and Cultural Preservation in Contemporary India

Santosh Kurubet
Faculty, Department of History
Soniya BA and BCOM Degree College, Dharwad, Karnataka, India
Corresponding Author – Santosh Kurubet

DOI - 10.5281/zenodo.23058705

Abstract:

This research paper provides a comprehensive, multi-disciplinary examination of the complex intersections between history, heritage, culture, and identity within the dynamic socio-political and economic context of contemporary India, with special contextual focus on Karnataka. In an era defined by rapid globalization, digital transformation, urban expansion, and re-negotiations of national and regional selfhood, the legacy of the past is no longer a static repository of artifacts but an active site of contestation, economic revitalization, and socio-cultural identity formation. This article investigates how historical narratives are constructed, remembered, and institutionalized, and how tangible and intangible cultural heritages serve as the foundational pillars for collective memory and regional pride. Analyzing case studies ranging from the monumental heritage of Hampi, Pattadakal, and Badami to living traditions such as Yakshagana, Bidriware, and folk performances, the paper highlights the dual challenge of heritage conservation: mitigating the destructive forces of unchecked commercial urbanization while dismantling neo-colonial and elite-centric frameworks in historiography. Furthermore, the paper examines contemporary policy initiatives such as the National Education Policy (NEP) 2020, modern GIS-based digital mapping of archaeological sites, community-driven eco-tourism, and sustainable cultural asset management. By synthesizing historiographical theories with empirical observation, the study argues for a participatory, inclusive, and democratized paradigm of heritage management that aligns cultural preservation with socioeconomic development and environmental sustainability.

Keywords: Historiography, Tangible & Intangible Heritage, Identity Politics, Karnataka History, Digital Humanities, Cultural Tourism, Sustainable Preservation.

Introduction: The Interlinked Quadruplet:

The concepts of history, heritage, culture, and identity constitute an inextricably linked quadruplet that shapes the social fabric, human consciousness, and political trajectory of any civilization. While history provides the chronological and analytical account of human actions, institutional transformations, and socio-economic evolutions over time, heritage represents that portion of the past which a community intentionally selects, preserves, endows with value, and transmits to future generations. Culture serves as the overarching matrix of shared meanings, living customs, artistic expressions, linguistic codes, and moral values that animate daily existence. Identity, in turn, is the dynamic sense of individual and collective selfhood synthesized through historical memory, inherited traditions, and cultural practices.

In twenty-first-century India, this quadruplet has acquired unprecedented significance and complexity. The nation finds itself at a unique historical crossroads characterized by deep structural modernization, accelerated technological adoption, and global integration on one hand, and a profound cultural resurgence, regional assertiveness, and historicist debates on the other. As urbanization,

industrial infrastructure projects, and digital saturation alter traditional rural landscapes and social structures, questions concerning what constitutes 'authentic heritage' and whose 'history' is memorialized have moved from specialized academic forums into the public domain.

The region of Karnataka provides an exceptionally rich lens through which to examine these complex dynamics. Boasting an uninterrupted history spanning prehistoric rock art, majestic ancient and medieval dynasties—such as the Kadambas, BadamiChalukyas, Rashtrakutas, Hoysalas, Vijayanagara Emperors, and the Deccan Sultanates—as well as rich anti-colonial struggles and modern socio-religious reform movements, Karnataka embodies a microcosm of India's multi-layered heritage. From the architectural brilliance of Hampi and Pattadakal to living traditions like the Vachana literature of the 12th-century Sharana movement, Yakshagana theatre, and indigenous handicrafts like Bidriware and Kinnal toys, the region illustrates how tangible monuments and intangible traditions continuously inform regional identity (Kannada Asmite) within the broader framework of Indian nationhood.

However, contemporary processes of rapid economic growth, unmanaged mass tourism, atmospheric pollution, and urbanization pose severe threats to physical cultural assets. Simultaneously, globalized mass media and westernized consumerist culture present existential challenges to living folk performance arts and indigenous crafts. Therefore, this article seeks to critically analyze the interrelationships between history, heritage, culture, and identity in contemporary India; evaluate current conservation strategies and policy initiatives; and propose a holistic, sustainable framework that integrates community participation, modern digital technologies, and inclusive historiography.

Theoretical And Historiographical Dimensions:

1. Defining History vs. Memory vs. Heritage:

To establish a rigorous conceptual framework, it is crucial to distinguish between history, memory, and heritage—terms that are frequently conflated in public discourse. History, as a rigorous academic discipline, relies on critical source analysis, empirical evidence, archival documentation, and methodical contextualization. It seeks to reconstruct and interpret past events objectively, acknowledging historical contradictions, ruptures, and complexities.

In contrast, as the French historian Pierre Nora famously articulated in 'Lieux de Mémoire' (Realms of Memory), memory is living, fluid, and inherently tied to present collective identity. Memory resides in social groups and is subjective, selective, and emotionally charged. Heritage acts as the operational bridge between history and memory. David Lowenthal, in his seminal work 'The Past is a Foreign Country', noted that heritage is not a neutral record of the past, but a contemporary creation designed to fulfill present psychological, political, and social needs. Heritage 'uses' the past to cultivate solidarity, legitimacy, and belonging.

2. Historiographical Paradigms in Indian Context:

The evolution of Indian historiography profoundly reflects changing paradigms of national and regional identity. Colonial historiography, spearheaded by British administrators and Orientalist scholars in the 18th and 19th centuries, frequently employed eurocentric and reductionist frameworks. Scholars like James Mill categorized Indian history into rigid 'Hindu', 'Muslim', and 'British' periods, constructing a narrative of continuous stagnation and oriental despotism to justify colonial rule.

In response, the Nationalist historiographical movement of the late 19th and early 20th centuries sought to reclaim indigenous agency, highlighting the artistic, political, and philosophical achievements of ancient Indian empires. Post-independence historiography witnessed the emergence of Marxist and subaltern approaches, which shifted focus from dynastic elites to socio-economic structures, agrarian relations,

class conflicts, and the voices of marginalized communities, peasants, and women.

In contemporary times, historiography faces the dual challenge of decolonizing methodologies while guarding against hyper-nationalist or chauvinistic historical revisions. Modern historical inquiry demands a polyphonic approach—one that acknowledges regional diversity, caste dynamic complexities, subaltern voices, and global trade networks that connected ancient India to Western Asia, Southeast Asia, and the Greco-Roman world.

Tangible Heritage and Architectural Metanarratives:

1. Monumental Architecture as Physical History:

Tangible heritage—encompassing stone monuments, temples, forts, rock-cut caves, urban settlements, and epigraphs—serves as the permanent, physical testament to human creativity, engineering mastery, and social organization. In Karnataka, the evolution of temple architecture offers a textbook illustration of architectural synthesis and innovation. The early Chalukyas of Badami (6th–8th centuries CE) turned the red sandstone cliffs of Badami, Aihole, and Pattadakal into laboratories of structural design, seamlessly experimenting with Nagara (North Indian) and Dravida (South Indian) architectural styles.

This architectural momentum reached pinnacle heights under the Hoysalas (11th–14th centuries CE), who utilized soft chloritic schist (soapstone) to carve intricately detailed star-shaped temple complexes at Belur, Halebidu, and Somanathapura. The UNESCO World Heritage recognition granted to the 'Sacred Ensembles of the Hoysalas' in 2023 underscores the international acknowledgement of this aesthetic and engineering marvel.

Table 1: Architectural and Structural Paradigms in Major Dynastic Eras of Karnataka

Dynasty / Era	Primary Material	Architectural Style / Innovation	Key Key Historical Sites
BadamiChalukyas (6th–8th C. CE)	Red Sandstone	Vesara experimentation, Nagara&Dravida rock-cut & structural temples	Badami Caves, Aihole, Pattadakal
Hoysala Empire (11th–14th C. CE)	Chloritic Schist (Soapstone)	Stellated (star-shaped) ground plans, exquisite micro-carvings, lathe-turned pillars	Belur, Halebidu, Somanathapura
Vijayanagara Empire (14th–16th C. CE)	Granite & Brick	Monolithic pillars, KalyanaMandapas, secular-courtly Islamic synthesis	Hampi, Lepakshi, Sringeri
Deccan Sultanates (15th–17th C. CE)	Basalt & Mortar	Indo-Islamic domes, acoustic whispering galleries, majestic arches	Bijapur (GolGumbaz), Bidar Fort

2. The Vijayanagara Metropolis: Urban Planning and Water Management:

The imperial capital of Vijayanagara at Hampi provides an extraordinary study in urban planning, military defense, and resource management in arid terrain. Spanning over 4,100 hectares along the banks of the Tungabhadra River, Hampi integrated natural granite boulder landscapes into sophisticated defensive fortifications.

Crucial to Vijayanagara's survival and prosperity was its hydraulic engineering. The empire constructed an intricate network of aqueducts, stone-lined tanks (such as the Pushkarani), check dams, and channels like the

Raya Canal, which diverted river water directly into agricultural fields and core urban spaces. This historical lesson in sustainable water management in drought-prone regions remains profoundly relevant for modern urban planning in climate-vulnerable areas of Karnataka today.

Intangible Heritage and Living Traditions:

1. Folk Performing Arts, Ritual Practices, and Oral History:

While stone monuments withstand physical centuries, intangible cultural heritage lives within human memory, performance, and bodily practice. Intangible heritage includes oral traditions, performing arts, social practices, festive events, traditional craftsmanship, and ecological knowledge systems.

In Karnataka, Yakshagana—a traditional theatre form combining dance, music, elaborate costumes, and improvised dialogue based on epics like the Mahabharata and Ramayana—serves as a dynamic medium of living heritage. Unlike static texts, Yakshagana performances adapt ancient ethical dilemmas to contemporary social concerns, keeping classical mythology vibrant and accessible to rural and urban audiences alike. Similarly, ritual ritualistic folk forms like Bhoota Kola and Naga Mandala in coastal Karnataka, and DolluKunitha and Kamsale in the inland plains, embody deep connections between community identity, ancestral worship, and ecological reverence.

2. Literature, Philosophy, and Social Reform Movements:

Intangible heritage is equally enshrined in linguistic and socio-philosophical movements. The 12th-century Sharana Movement, led by philosopher-reformers like Basavanna, AllamaPrabhu, and AkkaMahadevi, revolutionized Kannada literature and society through the composition of 'Vachanas'—rhythmic, simplified prose poetry.

The Sharana movement challenged rigid caste hierarchies, ritualistic orthodoxy, and gender discrimination, advocating the dignity of labor ('KayakaveKailasa') and democratic discourse through the AnubhavaMantapa (Hall of Experience). This literary and social legacy continues to form a foundational pillar of Karnataka's progressive identity, illustrating how historical philosophical movements serve as enduring tools for social justice in modern society.

Cultural Identity and Regional Assertiveness:

1. Language, Symbolism, and 'Kannada Asmite':

Language is the premier vehicle of cultural identity. The Kannada language, possessing classical language status with a documented literary history spanning over fifteen centuries (starting from the Halmidi inscription c. 450 CE and Kavirajamarga c. 850 CE), forms the emotional and cultural core of 'Kannada Asmite' (Kannada pride and identity).

In post-independence India, the reorganization of states on a linguistic basis in 1956 brought together Kannada-speaking regions previously fragmented under the Bombay Presidency, Madras Presidency, Hyderabad Nizam's state, and Mysuru Kingdom into unified Karnataka. This administrative unification allowed regional identity to flourish, anchored by state symbols, literary festivals (Kannada SahityaSammelana), and regional iconography.

2. Pluralism, Syncretism, and Shared Sacred Spaces:

Karnataka's cultural identity is historically syncretic and pluralistic. The region has long served as a fertile ground where Jainism, Buddhism, Vedic Hinduism, Veerashaivism, Sufism, and Christianity coexisted and enriched one another.

Sites such as the Baba Budangiri hills (associated with both Sufi saint Dada Hayat Mir Qalandar and Dattatreya), the syncretic architecture of the Bahmani and AdilShahi monuments, and the Jain pilgrimage center of Shravanabelagola exemplify this harmonious heritage. Preserving this composite, syncretic identity is essential in contemporary times to counteract societal polarization and foster social harmony.

Contemporary Challenges to Heritage Preservation:

1. Urbanization, Encroachment, and Infrastructure Development:

Despite their immense historical and cultural value, heritage structures across India face unprecedented existential threats from rapid, unregulated urbanization. Industrial expansion, highway expansion, and residential encroachments frequently impinge upon protected buffer zones surrounding archaeological monuments.

Modern construction activities generate vibrations that weaken ancient stone masonry, while industrial emissions and urban air pollution cause atmospheric degradation of delicate relief sculptures. Furthermore, unplanned civil infrastructure often disrupts historic underground hydrology, causing foundation weakening in centuries-old structures.

2. Climate Change, Tourism Pressures, and Commercialization:

Climate change presents severe new challenges to heritage conservation. Unprecedented flash floods along the Tungabhadra River have repeatedly inundated parts of the UNESCO heritage site of Hampi in recent years, threatening fragile structural remains.

Simultaneously, mass, unmanaged tourism leads to physical wear and tear, littering, vandalization, and commercial over-exploitation. When cultural sites are turned into pure commercial commodities without carrying-capacity regulations, their historical sanctity and local community connections are severely degraded.

Policy Frameworks, Digital Humanities, And Future Directions:

1. Government Policies and Educational Integration (NEP 2020):

Addressing heritage conservation challenges requires robust policy interventions and structural integration into national education systems. The National Education Policy (NEP) 2020 emphasizes the integration of Indian Knowledge Systems (IKS), regional languages, local history, and experiential heritage learning into school and university curricula.

By encouraging field visits to historical sites, local archival research, and interdisciplinary studies bridging history, chemistry (material conservation), and technology, educational institutions can foster deep heritage stewardship among youth.

2. Digital Humanities, GIS Mapping, and Virtual Reality:

The emerging field of Digital Humanities offers groundbreaking tools for heritage documentation and preservation. Advanced technologies such as 3D Laser Scanning, Geographic Information Systems (GIS) mapping, Photogrammetry, and Virtual Reality (VR) reconstructions enable high-resolution digital archiving of monuments and artifacts.

Projects utilizing 3D digital twinning can virtually preserve vulnerable monuments, enabling global researchers to study structural details and enabling virtual tourism for individuals unable to visit physically. Digital repositories of ancient manuscripts and epigraphs (such as digital epigraphy initiatives) protect fragile knowledge bases from physical degradation.

Table 2: Modern Heritage Management & Preservation Framework Matrix

Strategic Pillar	Key Methodologies / Technologies	Expected Socio-Cultural Impact
Digital Documentation & Virtual Preservation	3D LiDAR Scanning, GIS Mapping, Photogrammetry, Digital Epigraphy	Creates permanent digital records; enables remote scholarly access & immersive virtual tourism
Community-Centric Eco-Tourism	Local homestays, trained community guides, artisanal craft hubs, revenue sharing	Empowers local communities economically; prevents heritage vandalism through local ownership
Curricular Integration (NEP 2020 / IKS)	Heritage walks, local history modules, school adoption of monuments	Fosters grassroots awareness and intergenerational cultural responsibility among students
Scientific Material Conservation	Nanotechnology consolidants, chemical cleaning, eco-friendly structural repair	Extends physical lifespan of ancient masonry without causing chemical degradation

Conclusion:

History, heritage, culture, and identity are not static artifacts of a bygone era; they are dynamic, living dimensions of contemporary human life. As India navigates its path towards modern economic leadership and technological development, the preservation of its diverse cultural heritage and historic consciousness provides essential moral, philosophical, and social moorings.

Through a balanced approach that combines scientific material conservation, modern digital humanities tools, inclusive educational frameworks under NEP 2020, and democratic community participation, historical assets can be effectively protected. Regions like Karnataka, with their profound architectural monuments, vibrant living traditions, and rich egalitarian socio-philosophical movements, demonstrate that honoring heritage is not an obstacle to progress, but rather the very foundation upon which a resilient, inclusive, and self-aware future is constructed.

References:

1. Altekar, A. S. (1934). State and Government in Ancient India. MotilalBanarsidass Publishers.
2. Asher, C. B., & Talbot, C. (2006). India Before Europe. Cambridge University Press.
3. Champakalakshmi, R. (1996). Trade, Ideology and Urbanization: South India 300 BC to AD 1300. Oxford University Press.
4. Eaton, R. M. (2005). A Social History of the Deccan, 1300–1761: Eight Indian Lives. Cambridge University Press.
5. Foekema, G. (1996). A Complete Guide to Hoysaḷa Temples. Abhinav Publications.
6. Fritz, J. M., &Michell, G. (2012). HampiVijayanagara. Jaico Publishing House.
7. Lowenthal, D. (1985). The Past is a Foreign Country. Cambridge University Press.
8. Nora, P. (1989). Between Memory and History: Les Lieux de Mémoire. Representations, (26), 7-25.
9. Ramesh, K. V. (1984). Chalukyas of Vātāpi. Agam Kala Prakashan.
10. Sastri, K. A. Nilakanta. (1955). A History of South India from Prehistoric Times to the Fall of Vijayanagar. Oxford University Press.
11. Settar, S. (1992). The Hoysaḷa Temples (Vols. 1-2). Karnatak University Press.
12. Stein, B. (1989). The New Cambridge History of India: Vijayanagara. Cambridge University Press.
13. Thapar, R. (2002). Early India: From the Origins to AD 1300. Penguin Books.
14. UNESCO World Heritage Centre. (2023). Sacred Ensembles of the Hoysalas. Retrieved from https://whc.unesco.org/en/list/1670

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Administrative Centers of Belagavi District During the British Era

Vishwanath Ainapur[1] & Dr L. P. Maruthi[2]

[1]*Research Scholar, Dept of History & Archaeology, Karnatak University, Dharwad*

[2]*Professor, Dept of History & Archeology, Karnatak University, Dharwad*

Corresponding Author – Vishwanath Ainapur

DOI - 10.5281/zenodo.23058722

Abstract:

Belgaum district was ruled by various royal families over time, later falling under the Maratha rule and with the arrival of the British, this part came under the control of the British after the Marathas were defeated in the Third Anglo-Maratha War. The British established administrative centers one by one in the British-held Belgaum district and transformed into a district in the Bombay province. After making Belgaum the district headquarters the British established numerous administrative centers in the district,they are District collector's and District Magistrate's Office, Defence Department, Health Centre, Post Office, Judicial Court and several other administrative centers in the Belgaum district. The British began administering the region from all these administrative centers and undertook various public works. Over time, the British designated the Belagavi district as part of the southern revenue division.

Keywords: Administration, Collector, Mamaltadar, Cantonment, Southern Divisional, Court.

Introduction:

The Belgaum district has its own historical history from ancient times to the present. In ancient times, some parts of Belgaum district were ruled by Kadambas, Badami.Chalukyas, Kalyani Chalukyas, Rashtrakutas and many other feudatory kings who made their own contribution to this region. Later, the medieval Mughals and the Deccan Sultans, as well as the feudatory sultans of the Sultans, ruled this region and made their own contribution. Later, with the arrival of the British, the British fought several wars in their desire to control this region. The British fought many wars with the Marathas, defeated the Marathas in the Third Maratha War, and began to rule the Maratha territories under their rule. The British East India Company gained control of the Belgaum region after defeating the Peshwas in 1818. Administratively, Belgaum initially operated as part of the massive Dharwar (Dharwad) district,over time the British began creating various districts to suitable their administrative convenience; notably, Belagavi district was separated from Dharwad and granted district status in 1836, with the administrative office subsequently established in 1838. Mr. J.A. Dunlop, the Collector of Dharwad district, played a pivotal role in the formation of this district. Following theformation of Belagavi district, various administrative departments can be observed as follows.

District Collectorate / Zilla Kacheri:

The Belgaum Collectorate (Deputy Commissioner's Office) was formally established as an independent district headquarters on March 9, 1838, under the British East India Company administration. The Belgaum collectorate was made of ten talukas like Parasagad, Sampagav, Padshapur(pachapur), Chikodi, Bagalakhote, Indi, Mudibihal(mudebihal), Hungund, Badami, and Bidi. That time Gokak and Uthanee(Athani) was famous paragana's in the district. In 1864 Bgalakhote, Badami, Hunagunda, and Mudebihal all these talukas transformed to the newly district of kaladagi collectorate. Later Belgaum, Bidi, Sampagav,

Parasagad, Gokak, Chikodi, Athani, Pachapur, Saundatti all these talukas control of Belgaum collectorate and also Belgaum was the district headquarters of Land revenue, district administration, courts, correspondence with Bombay Presidency.The District Collector was responsible for tasks such as revenue collection and the administration of justice.

Taluka Mamlatdar Kacheri/ Tahasiladar Office:

The Belgaum Collectorate (part of the Bombay Presidency) was divided into several sub-divisions and talukas, each managed by a local Mamlatdar office relating to a specific village or tract under the Belgaum Collectorate would fall under the specific Mamlatdar office of that respective sub-division/taluka active at the time, such as Belgaum, Sampgaon(later Bailhongal), Bidi(later Khanapur), Padasapur(pachapur) Chikodi, Parasgad(later Soundatti), Gokak, Uthanee(Athani) all these Mamlatdar Kacheri/ Tahasiladar office handled land records, tax collection, village disputes, and registration of local documents, Mamlatdar/Tehsildar under British government. All these Talukas Mamalatadar the collected revenue was being remitted to the district collectorate of Belgaum district.

Sub-Registrar Office:

Sub-Registrar OfficeFor registration of deeds, sale documents, wills. British introduced formal registration under the Registration Act 1866 andAny land sale, mortgage, or legal document had to be "recognized /registered" here to be valid. Belgaum city had the main Sub-Registrar and also each taluks have sub-registrar office, this department was one of the sources of revenue for the British; consequently, they began collecting revenue through its.

Belgaum cantonment Zone:

In 1818, following the defeat of the Maratha Peshwas at the Battle of Kirki (Koregaon), the British gained control of the Maratha territories in Northern Karnataka surround district Dharwad Bijapur, Karwar (North Kannada), The Belgaum cantonment zone established in 1832 by the British, the Belgaum (Belagavi) Cantonment spans 1,777 acres and comprises the Main Cantonment and Fort zones. Initially placing it under the military command of Madras, in 1828Establishment of Military Station, The British recognized Belgaum's strategic location and salubrious climate, leading to the creation of a permanent military station. The British government decide to official Cantonment Zone in Belgaum were officially notified under Governor-General Order No. 99 on March 2, 1832. Finaly Belgaum cantonment zone established in 1832, cantonment is historic military zone split into two primary areas the main cantonment and Fort zone. In1836 the area was integrated into the Bombay Presidency, making it an influential urban and administrative hub in the southern division. The cantonment working asthe Cantonment land, building permissions, sanitation for troops not for civilians and one of the famous departments of the British administration in Belgaum district.

Southern Divisional/ Divisional Commissioner Office:

The British established divisional headquarters for administrative convenience so the Belgaum district became the regional hub for the Southern Division in 1878 under the Bombay Presidency, shifting administrative control from Dharwad. This change boosted its status as a key center for regional governance and military oversight. The division was headed by a senior civil service commissioner (ICS) and the division have four districts namely Belgaum, Dharwad, Kaladagi(Bijapur), Canara and also called kannadda speaking districts.

Belgaum District Court:

Legal cases from Belagavi district were previously heard in the Dharwad district court. Proceedings for cases from both Belagavi and Dharwad were slow and time-consuming, and the

volume of legal cases had increased significantly following the 1857 uprising. Recognizing this, the British decided to bifurcate the judicial system; they established the Belagavi District Court to handle smaller cases locally in Belgaum.Subordinate courts were subsequently set up in Chikkodi, Gokak, and Athani under the jurisdiction of this court.The court was establishment in1886, The Belgaum Court was formally to handle the growing legal, administrative, and criminal cases in the region.

Telegraph office:

A telegraph office was established in 1855 at Belgaumunder the British administration.It served as a key reginal transit and switching node where major early telecommunication line met connecting Belgaum to Pune in 1856 and Goa in 1857, in those days the telegraph office was an excellent medium of communication.

Medical and Public Health Service:

The Belgaum district was the prior to the allopathic system of medicine, Belgaum was the center of ayurvedic practitioners in the past and has produced many pandits of ayurvedic doctors.The Belgaum district hospital opened in 1859 and the other taluka's hospital like Gokaka 1865, Athani 1871, Saundatti 1875, Chikodi 1882 and Khanapur 1887. In Belagavi district, the British placed great emphasis on healthcare; in addition to establishing a district hospital, they set up a pharmaceutical industry for the production of medicines.

Post Office/ Dak Circle:

In 1836 when was Belgaum became a separate district then the company dak office was set up near the Collectorate office ofBelgaum,this was the first official postal setup.In 1854 Belgaum a got a real public post office with stamp later upgraded to head post office in of status with sorting for all 10 taluks of Belgaum district.Carnatic division containing Belgaum, Dharwad, kaladhagi,Kolhapur, Karwar, Satara, Mahabaleshwar,Pandharpur, Solapur and Bijapur. Belgaum had a district head post office under the Bombay postal circle it is the worked British efforts to connect cantonment and collectorate.This service provided by the British greatly benefited the public; locals began communicating with one another across different locations through letters.

Conclusion:

For administrative purposes, the British separated the Belagavi district from the Dharwad district, granted it district status, and established numerous departments to conduct administration; this brought administrative benefits not only to the British but also to the local population. During the British era, one could observe various administrative centers in Belagavi district, such as the Deputy Commissioner's office, District Court, District Post Office, District Health Office, District Divisional Office, and the Cantonment zone, etc. Initially, the British selected officers for these departments based on seniority, but later they began recruiting officers through the ICS examination. Administrative decentralization facilitated development and revenue collection across various parts of the district. Overall, numerous administrative centers were established in the Belagavi district during the British era.

References:

1. H J Stokes: *An Historical Account of the Belgaum District*, At the Education society's press, Byculla,1870
2. Bombay Government Gazette, At the Education society's press, Byculla,1852
3. Postal Communication &c. in India, Report of the commissioners for Post office inquiry, 1852
4. East India Annual Revenue Accounts, 1833
5. Gazetteer Bombay Presidency vol. I, Part II *History of the Konkan, Dakhan and Southern Maratha Country,* The Government Central Press, 1896

6. Suryanath U Kamath, *Karnataka State Gazetteer*, Parishree Printers nagappa street Guttahalli, Bangalore, 1983
7. Gazetteer Bombay Presidency, *Volume XXI-B, Belgaum*, The Government Central Press,1926
8. Selection form the Records of the Bombay Government, No LXXXI Papers *Introduction of revised rates of Assessment into Hoongoond and part of the Uthanee talukas and Yadwar mahal of the Gokak Talkua*, At the Education society's press, Byculla,1864
9. C M Munnoli, *Belgaum as an Urban Centre Under the Bombay Presidency*, IJSR vol.4/issue-9, 2015
10. DR. C B Kamati & Mathapati, Administration *System of Belagavi* (1800-1947) IJIRT, Vol.10/ issue 1 june2023
11. E E Viollet le Duc, *Military Architecture*, Green Hill Books London presidio presses California, 1990
12. Middleton Robin, *Neoclassical and 19th Century Architecture*, New York Abrans, 1980

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Historical Perspectives on Social and Economic Transformation through Veerashaiva–Lingayat Mathas in Dharwad District

Mallappa Bairappanavar
Research Scholar, Department of History,
Srinivas University, Mangalore
Corresponding Author – Mallappa Bairappanavar

DOI - 10.5281/zenodo.23058745

Abstract:

The Veerashaiva–Lingayat Mathas of Dharwad district have played an important role in the historical development of religion, education, society and the local economy. The history of Dharwad has been shaped by several political powers, including the Chalukyas, Vijayanagara rulers, Adil Shahis, the Marathas and, subsequently, the British. The district entered a new administrative phase under British rule, and Dharwad gradually emerged as an important centre of education and Kannada cultural activity.

Within this changing historical environment, Veerashaiva–Lingayat Mathas functioned not merely as religious institutions but also as centres of learning, charity, cultural transmission, social interaction and community organization. Institutions such as Murugha Matha, Siddharoodha Matha, Moorusaviramatha and other regional Mathas formed part of Dharwad's religious and cultural landscape. The district administration itself identifies several such Mathas as important religious and cultural institutions.

This paper examines the historical role of Veerashaiva–Lingayat Mathas in social and economic transformation, particularly from the pre-colonial period through the British period and into the modern era. It studies their contribution to traditional education, Kannada and Sanskrit learning, food and shelter for students and pilgrims, charity, social service, cultural preservation, occupational networks and community mobilization. It also examines the interaction between traditional Matha institutions and new colonial institutions such as modern schools and administrative structures.

The paper argues that the historical significance of these Mathas can best be understood as part of a broader process of institutional transformation. Their activities connected religious values with education, charity, cultural activity and social organization. At the same time, their role changed in response to colonial modernity, urbanization, new educational opportunities and changing economic conditions. The study therefore views the Mathas as dynamic institutions that participated in the social and economic transformation of Dharwad rather than as exclusively religious establishments.

Keywords: Veerashaiva, Lingayat, Matha, Dharwad, Social Transformation, Economic Transformation, Education, Colonial Period, Charity, Cultural History.

Introduction:

The history of Karnataka is closely associated with religious and institutional traditions that contributed to the development of education, literature, social organization and cultural life. Among these institutions, the Veerashaiva–Lingayat Mathas occupy a significant position. A Matha traditionally served as a religious centre under the guidance of a spiritual head or Swamiji, but its activities frequently extended into education, charity, cultural preservation and community service.

Dharwad occupies a distinctive place in the history of northern Karnataka. The district has experienced the rule of several political powers and has been a meeting point of Kannada, Marathi and other cultural influences. According to the Dharwad District Administration, the region came under

different dynasties and political authorities before British rule, while during the British period Dharwad became a divisional headquarters for educational administration and Kannada gained greater prominence as the vernacular language.

This historical environment created conditions in which traditional institutions and modern institutions interacted. Veerashaiva–Lingayat Mathas continued their traditional functions while responding to changing social circumstances.

The present study therefore seeks to understand the Mathas from a wider historical perspective. Rather than examining them only as centres of religious activity, it considers them as institutions that participated in processes of social and economic change.

Historical Background of Dharwad:

Dharwad has a long historical background. The region was associated with several major political powers of South India. The official district history mentions the influence of the Badami and Kalyana Chalukyas, Rashtrakutas, Vijayanagara, Adil Shahi rulers, Mysore rulers and the Peshwas.

The political history of the region influenced its social and cultural development. The establishment of administrative centres, markets, religious institutions and educational centres gradually transformed the region.

During the early nineteenth century, political changes brought Dharwad increasingly under British administrative influence. The district administration records that in 1830 the southern Maratha country was brought under Regulation VII and the territories were formed into a Collectorate known as Dharwad District or Zilla.

The nineteenth century was therefore an important period of transition. Traditional institutions existed alongside new administrative, educational and commercial structures.

It was within this historical context that Mathas adapted their functions to changing circumstances.

Emergence and Development of Veerashaiva–Lingayat Mathas:

The Veerashaiva–Lingayat tradition has a long institutional history in Karnataka. Mathas became important centres for the preservation and transmission of religious teachings, philosophical ideas, vachana literature and spiritual practices.

The Matha provided an institutional framework through which the relationship between the Guru, disciple and wider community was maintained.

In Dharwad district, different Mathas developed in different localities. A compilation of Lingayat Mathas in the Dharwad region, for example, lists institutions such as Panchagraha Hirematha, Shivananda Matha, Phakireshwara Matha, Virakta Matha, Murugha Matha and other Mathas in Dharwad, Kundagol, Kalghatgi and surrounding areas.

These institutions should not, however, be treated as completely identical. Their histories, traditions, leadership structures, educational activities and relationships with local communities differed.

Consequently, a historical study should examine individual Mathas as well as the broader institutional tradition.

Mathas as Centres of Traditional Education:

One of the most important historical functions of Mathas was education.

Before the widespread expansion of modern government education, religious institutions played an important role in transmitting knowledge. Students could receive instruction in religious texts, philosophy, languages, ethics and traditional learning.

The educational activities of Mathas included:

1. Religious instruction
2. Sanskrit learning
3. Kannada literary learning
4. Study of Vachana literature
5. Philosophy and theology

6. Moral education
7. Training of disciples
8. Informal community education

The Matha environment was therefore an educational environment in a broader sense.

The importance of this traditional educational system became particularly significant when colonial education began to expand. Dharwad subsequently developed into an important educational centre. The official district history specifically notes its role as a headquarters of educational administration during British rule.

The Mathas consequently existed alongside emerging schools and colleges.

Interaction with British Education:

The nineteenth century brought substantial changes to the educational structure of India.

British educational policies encouraged the development of institutional schooling, modern curricula, English education and government-supervised educational administration.

Three important developments usually associated with nineteenth-century colonial education were:

- Macaulay's Minute of 1835
- Wood's Despatch of 1854
- Hunter Commission of 1882

These developments contributed to the expansion of modern education.

The effect on traditional Mathas was complex. They did not simply disappear with the introduction of modern schools. Instead, many continued their religious and cultural functions while adapting to the new educational environment.

The historical interaction between the two systems can therefore be understood in three ways:

First, competition

Modern schools increasingly provided forms of education that traditional institutions had not previously offered.

Second, adaptation

Mathas began to recognize the importance of modern education, particularly for students seeking employment and higher learning.

Third, complementarity

Traditional moral, religious and cultural instruction could continue alongside modern schooling. Thus, colonial education did not simply replace the Matha system; it contributed to a transformation in its functions.

Social Transformation through Mathas:

Social transformation refers to changes in social relationships, institutions, values, occupations, education and patterns of community interaction.

Veerashaiva–Lingayat Mathas contributed to such transformation through several mechanisms.

1. Community Organization:

Mathas served as meeting places for members of the community. Religious festivals, discourses, spiritual gatherings and social events brought people together.

This strengthened social networks.

2. Charity:

Charity constituted another important function.

Mathas traditionally provided food, accommodation and assistance to visitors, students, disciples and people in need. The broader Lingayat institutional tradition has also been associated with educational and residential support for students.

Such activities had social as well as economic consequences because they reduced the immediate financial burden on economically disadvantaged families.

3. Social Awareness:

Religious discourses and public gatherings created opportunities for discussing moral, social and cultural questions.

The teachings associated with the Lingayat tradition emphasized ethical conduct, devotion and the dignity of labour. These principles provided a framework for social discussion.

4. Cultural Integration:

Mathas helped preserve religious traditions, local customs, literature, music and oral traditions.

In a culturally diverse district such as Dharwad, this function contributed to the preservation of regional identity.

Contribution to Kannada Language and Literature:

Dharwad has played a major role in Kannada literary and cultural history.

The official district profile emphasizes the importance of Dharwad in literature, music and the arts and notes the district's association with prominent literary and musical personalities.

Veerashaiva–Lingayat Mathas contributed to this cultural environment through the preservation and transmission of:

- Vachana literature
- Religious poetry
- Biographical literature
- Philosophical works
- Kannada devotional literature
- Sanskrit texts
- Oral traditions

Mathas could function as repositories of manuscripts and religious texts and as places where literary works were read, discussed and transmitted. This cultural function contributed to the continuity of Kannada intellectual traditions.

Mathas and Social Service:

The concept of service occupied an important place in the institutional activities associated with many Mathas.

Social service included:

- Annadana
- Accommodation
- Assistance to students
- Support for pilgrims
- Assistance during religious festivals
- Community gatherings
- Educational encouragement
- Assistance to economically weaker sections
- Such activities created what may be described as a community-based welfare structure.
- This was particularly significant in periods when modern welfare institutions were limited.

The Matha could therefore function as an intermediary between individual households and the wider community.

Economic Dimensions of Matha Institutions:

The economic history of Mathas requires careful analysis.

Mathas could possess or receive economic resources through:

- Land endowments
- Donations
- Offerings
- Community contributions
- Agricultural income
- Patronage
- Institutional properties
- These resources supported the functioning of the institution.
- Economic resources could be used for:
- Maintenance of buildings
- Religious activities
- Food distribution
- Educational activities
- Salaries or support for workers
- Festivals
- Charitable activities

The Karnataka State Gazetteer is an important source for studying the historical administrative, economic and institutional context of Dharwad. The revised Dharwad Gazetteer was published by the Karnataka Gazetteer Department in 1993.

Mathas and Agrarian Economy:

The rural economy of Dharwad historically depended heavily on agriculture.

The present district profile continues to describe dry farming as an important component of the agricultural economy, with crops including

cotton, wheat, ragi, jowar and oilseeds depending on soil and region.

Historically, Mathas were connected to rural society through devotees, agricultural communities, donors and local networks.

Where Mathas possessed agricultural resources or received agricultural donations, the relationship between religious institutions and agrarian society became economically significant.

The study of these relationships can reveal:

- Patterns of landholding
- Patronage
- Rural religious networks
- Agricultural production
- Redistribution through charity
- Institutional economic management

Therefore, the economic history of Mathas should be studied not only through income but also through their relationship with local production and social networks.

Mathas and Urban Economic Development:

Dharwad and Hubballi gradually became important urban centres.

- Urbanization encouraged the growth of:
- Markets
- Educational institutions
- Transport
- Trade
- Printing
- Employment
- Professional groups
- Mathas located in or around urban centres interacted with these emerging economic structures.
- They became places where rural and urban communities could meet.

Devotees visiting Mathas generated demand for transport, food, accommodation and local services. Festivals and religious gatherings could also contribute to temporary economic activity.

This illustrates how religious institutions could be connected to the local economy without being commercial institutions in the modern sense.

Mathas and Education as Economic Mobility:

Education was one of the most important links between Mathas and economic transformation.

Traditional education provided cultural and religious knowledge. Modern education increasingly provided access to government employment, professional occupations and new economic opportunities.

When Mathas supported students through food, accommodation or encouragement, they could indirectly reduce the cost of education.

The broader Lingayat educational tradition is documented as having established educational institutions and provided residential facilities for students.

Education could enable individuals to move from traditional occupations into:

- Teaching
- Government service
- Clerical employment
- Law
- Medicine
- Commerce
- Other professional occupations
- Thus, educational service had consequences beyond the classroom.

Mathas and the Changing Caste and Social Structure:

The social history of Veerashaiva–Lingayat institutions is complex.

The ideological heritage of the Lingayat movement includes criticism of certain forms of social hierarchy and emphasis on personal devotion and ethical living.

However, the historical development of any large social institution may involve differences between ideals and social practices.

Therefore, a scholarly study should avoid presenting the Mathas either entirely as revolutionary institutions or entirely as conservative institutions.

Instead, the research should investigate:

- Who had access to the Mathas?

- Who received education?
- Who received charitable assistance?
- What social groups participated in festivals?
- How did Mathas respond to marginalized communities?
- How did practices change over time?

Mathas and Women:

The role of women is another important area for research.

Women participated in religious activities, festivals, devotional practices and community networks connected with Mathas.

However, the nature and extent of women's institutional participation differed across time and place.

The study of women and Mathas should therefore examine:

- Women's participation in religious gatherings
- Female education
- Women's charitable activities
- Access to institutional resources
- Changing attitudes toward women's education
- Women's participation in modern educational institutions

This area remains particularly important for developing a gender-sensitive history of Mathas.

Mathas and the Printing and Knowledge Revolution:

The nineteenth and twentieth centuries witnessed the expansion of printing and publishing. Printed books and journals transformed the circulation of knowledge.

Religious institutions could use printing to circulate:

- Vachanas
- Religious texts
- Biographies
- Philosophical works
- Sermons
- Educational material
- This changed the traditional relationship between Guru and disciple.
- Knowledge was no longer restricted to oral transmission or manuscripts.

The Matha therefore became part of a wider intellectual transformation in which traditional knowledge entered the world of print.

Mathas and Music and Cultural Life:

Dharwad has an exceptionally important musical heritage.

The district administration highlights the association of Dharwad with major Hindustani musicians, including Kumar Gandharva, GangubaiHangal, Mallikarjun Mansur, Bhimsen Joshi and BasavarajRajguru.

Religious institutions formed one component of the broader cultural environment in which music and devotional performance developed.

Mathas provided spaces for:

- Bhajans
- Religious singing
- Vachana recitation
- Harikatha
- Spiritual discourses
- Festivals
- Cultural programmes

Such activities helped connect religious life with artistic expression.

Important Mathas in the Dharwad Region:

The historical study of the district should include both major urban Mathas and smaller rural institutions.

Among the institutions associated with Dharwad and the surrounding region are:

- Murugha Matha, Dharwad
- Siddharoodha Matha, Hubballi
- Moorusaviramatha, Hubballi
- Panchagraha Hirematha
- Shivananda Matha
- Phakireshwara Matha
- Virakta Matha
- Other local Veerashaiva Mathas

The official Dharwad district profile identifies Murugha Matha of Dharwad, Siddharoodha Matha and Moorusaviramatha of Hubli among the district's religious places.

A separate listing of Dharwad-area Lingayat Mathas also records institutions in Kundagol, Kalghatgi, Amminabhavi, Garag and Dharwad.

Colonialism and Institutional Transformation:

The British period introduced new forms of administration, education, law and economic organization.

The traditional authority of religious institutions therefore operated in a new political environment.

The Mathas responded in different ways:

- Continuity
- Religious teaching and spiritual activities continued.
- Adaptation
- Institutions responded to the growing importance of modern education.
- Expansion
- Some institutions increased their social and educational activities.
- Reorganization
- Changing legal and administrative conditions affected property and institutional management.
- Thus, colonialism produced institutional transformation rather than simply institutional decline.

Conclusion:

The historical study of "Historical Perspectives on Social and Economic Transformation through Veerashaiva–Lingayat Mathas in Dharwad District" reveals that the mathas were not merely religious institutions. They functioned as important centres of education, social organisation, cultural preservation, charity and community development. Their historical significance becomes particularly visible when the Dharwad region is examined through its changing political, educational and socio-economic contexts.

The Dharwad region passed through the rule of several political powers, including the Chalukyas, Vijayanagara rulers, Adil Shahis, Mysore rulers and Peshwas, before coming under British administration. The district subsequently became an important centre of educational administration during British rule. This changing environment provided the background against which Veerashaiva–Lingayatmathas adapted their traditional functions and responded to emerging social and educational requirements.

One of the most significant contributions of the mathas was in the field of education. Traditional learning in religious institutions preserved knowledge of Kannada, Sanskrit, religious literature, philosophy and ethical teachings. During the nineteenth and early twentieth centuries, educational initiatives associated with Veerashaiva institutions increasingly incorporated modern schooling, scholarships and residential facilities. Historical research on Karnataka specifically identifies Veerashaivamathas among the private and religious agencies that contributed to the development of education before Independence.

The mathas also played an important role in social transformation. Through religious instruction, public discourse, charitable activities and community organisation, they helped create awareness concerning education and social advancement. In the Dharwad region, organisations associated with the Veerashaiva community established educational institutions, scholarships and hostels and participated in efforts aimed at improving educational and employment opportunities. These activities demonstrate that the institutional history of the mathas cannot be separated from the broader history of social change in North Karnataka.

From an economic perspective, the contribution of the mathas should be understood primarily through their institutional and community functions rather than as modern economic

organisations. Support for students, provision of food and accommodation, charitable assistance and educational investment helped individuals from rural and economically weaker backgrounds obtain access to education and employment. Such activities could indirectly contribute to occupational mobility and the emergence of an educated middle class.

Reference:

1. Kamath, Suryanath U., Karnataka State Gazetteer: Dharwad District (including Gadag and Haveri Districts), Government of Karnataka, Office of the Chief Editor, Karnataka Gazetteer, 1993. This is particularly useful for the historical, administrative, social, economic and educational background of the region.
2. Savant, M. Y., Paragana Dharwad Under the Peshwas (1753–1818): A Socio-Economic Study, Karnataka Historical Research Society, Dharwad. The work examines revenue administration, economy, social structure, trade, banking and other aspects of Dharwad before British rule.
3. Nandimath, S. C., A Handbook of Veerashaivism. This is a useful foundational work for understanding Veerashaiva philosophy, history and institutional traditions.
4. Hiremath, R. C., History and Philosophy of Lingayat Religion. Karnataka University, Dharwad/Prasaranga edition. Useful for the philosophical and historical background of the Lingayat tradition.
5. Hunshal, S. M., Lingayatism – A Total Revolution, Karnataka SahityaMandir, Dharwad, 1947. Useful for examining the social, ethical and socio-economic dimensions of Lingayat thought and reform.
6. Ushadevi, M. D., "Early Education Experiments: The Role of Religious Institutions and Other Private Agencies," Journal of Social and Economic Development, Vol. 1, No. 2, 1998, pp. 122–139. Particularly relevant to the educational role of Veerashaivamathas in Karnataka.
7. Dharwad District Administration, District Profile – Historical Background. Useful for establishing the broader historical and administrative context of Dharwad.
8. Karnataka Historical Research Society, Dharwad, publications and archival research materials. The Society has published more than 150 works covering history, literature, language and socio-economic themes.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Contested Pasts, Contested Selves: Heritage, Power, and the Politics of Identity in Postcolonial Societies

Shri. K. S. Chandi
HoD, Department of History,
KLE'S SSMS Arts Science and Commerce College, Athani
Corresponding Author – Shri. K. S. Chandi
DOI - 10.5281/zenodo.23058766

Abstract:

Heritage is routinely framed as a neutral act of preservation—a society's respectful transmission of its past to future generations. This paper challenges that framing, arguing that heritage is a fundamentally political process through which collective identities are constructed, legitimised, and contested. Drawing on critical heritage studies, postcolonial theory, and memory studies, the paper addresses a central problem: how do officially sanctioned heritage narratives shape collective identity, and how do marginalised communities contest and reframe these narratives to assert alternative selves? Through a qualitative synthesis of secondary literature and comparative case analysis of India, South Africa, and Australia, the study demonstrates that heritage performs a dual function. It legitimises existing power structures by naturalising particular historical narratives—what Laurajane Smith terms the "Authorized Heritage Discourse"—while simultaneously supplying subaltern communities with a resource for counter-identity formation. The paper examines key policy shifts, including the Burra Charter's emphasis on "cultural significance" and the 2003 UNESCO Convention on Intangible Cultural Heritage, arguing that while these instruments acknowledge pluralism in principle, their implementation remains constrained by nationalist and market forces. The paper concludes that identity formation through heritage is neither singular nor stable but an ongoing negotiation between official memory and vernacular practice. It contributes to scholarship on heritage politics, memory, and the sociology of culture, and proposes a more democratic heritage framework grounded in contestation rather than consensus.

Keywords: Critical Heritage Studies, Cultural Identity, Authorized Heritage Discourse, Postcolonialism, Memory Politics, Intangible Heritage, Subaltern Heritage.

Introduction:

Heritage is often imagined as the gentle work of caring for the past. A museum conserves a manuscript; a state protects a monument; a community passes down a song. These activities appear benevolent, even self-evident. Yet the question of whose past is preserved, how it is interpreted, and who is authorised to speak on its behalf is never innocent. Heritage is a battlefield dressed as a library.

In an era marked by demands for repatriation, the toppling of colonial statues, and the rise of identity politics across the globe, the relationship between heritage and identity has become urgent. Statues of slave traders have been pulled down in Bristol; debates over the Elgin (Parthenon) Marbles continue unresolved; indigenous communities in Australia, Canada, and Aotearoa New Zealand have demanded the return of ancestral remains held in European museums. These are not isolated controversies. They are symptoms of a deeper truth: heritage is one of the primary mechanisms through which collective identities are produced, contested, and transformed.

This paper advances three related arguments. First, heritage does not merely reflect a pre-existing identity; it actively constitutes it. Second, the central tension in heritage practice lies

between authorised heritage—the narratives sanctioned by state institutions and expert bodies—and vernacular or subaltern heritage practices that challenge these official accounts. Third, the outcome of this tension is not resolution but ongoing negotiation, and it is within that negotiation that democratic cultural politics becomes possible.

The paper proceeds in five parts. Following this introduction, Section 2 establishes the theoretical framework, drawing on Laurajane Smith's concept of the Authorized Heritage Discourse (AHD), Stuart Hall's theorisation of cultural identity as "becoming," and David Lowenthal's distinction between history and heritage. Section 3 examines how heritage legitimises national and colonial identities, with attention to India and the legacies of imperial collecting. Section 4 explores how marginalised communities mobilise heritage as a resource for counter-identity formation, drawing on South African and Australian cases. Section 5 considers the policy dimensions—the Burra Charter and the UNESCO Intangible Cultural Heritage Convention—and their limits. Section 6 concludes with implications for heritage practice and a call for a more democratic, agonistic heritage framework.

Theoretical Framework: Heritage as Discourse, Identity as Process:

1. The Authorized Heritage Discourse:

Laurajane Smith's Uses of Heritage (2006) provides the foundational critique for contemporary critical heritage studies. Smith argues that a dominant Western discourse—the Authorized Heritage Discourse (AHD)—shapes how heritage is defined, valued, and managed across the globe. This discourse privileges materiality (buildings, objects, sites), monumentality (grandeur and age-value), expert knowledge (conservators, archaeologists, historians), and national significance. It delegitimises intangible, communal, and everyday forms of heritage, dismissing them as "folklore," "craft," or "tradition" rather than authentic heritage.

Crucially, Smith insists that the AHD is not a neutral descriptive framework but a "political resource" that reinforces particular power relations. When experts determine what counts as heritage, they are also determining whose identity is validated and whose is rendered invisible. The AHD thus functions as a technology of governance, producing subjects who identify with the nation-state and its authorised past.

The historical roots of the AHD lie in nineteenth-century European nationalism. As nations consolidated, heritage became a tool for constructing imagined communities (Anderson, 1983). Cathedrals, castles, and ancient ruins were enlisted to narrate continuity, unity, and shared destiny. The discipline of archaeology, emerging in this period, was complicit in these projects, often producing evidence that served nationalist claims.

2. Lowenthal: Heritage as Celebration, Not Analysis:

David Lowenthal's The Heritage Crusade and the Spoils of History (1998) sharpens the distinction between heritage and history. Lowenthal argues that heritage is not "bad history" but a fundamentally different mode of engaging with the past. History seeks to analyse, explain, and complicate; heritage seeks to celebrate, commemorate, and affirm identity. Heritage is "not a testable or even a plausible account of what happened, but a declaration of faith in a particular version of the past" (Lowenthal, 1998, p. 121).

This distinction is important for two reasons. First, it explains why heritage so readily serves ideological purposes: its function is affirmation, not verification. Second, it suggests that critiques of heritage that demand "accuracy" may miss the point. The problem is not that heritage is inaccurate but that its affirmation of identity is unequally distributed—some identities are celebrated, others erased.

3. Hall: Identity as Becoming:

Stuart Hall's theorisation of cultural identity provides the second pillar of the framework. In "Cultural Identity and Diaspora" (1990), Hall

identifies two conceptions of cultural identity. The first treats identity as a fixed essence—a shared culture and history that a people "have always been." The second, which Hall advocates, understands identity as a matter of "becoming" as well as "being." Identity is "a matter of 'becoming' as well as of 'being.' It belongs to the future as much as to the past. It is not something which already exists, transcending place, time, history and culture" (Hall, 1990, p. 225).

For Hall, identity is constituted through difference and contestation. It is never complete, never settled. This framing is crucial for understanding heritage's role. If identity is processual, then heritage practices are sites where that process unfolds. Heritage does not merely reflect who "we" are; it is a means by which "we" are constituted as a collective—and, critically, a means by which some are excluded from that collective.

4. Postcolonial Context:

The dynamics of heritage and identity take on particular salience in postcolonial settings. Colonial administrations routinely used heritage—archaeology, museum collections, architectural preservation—to legitimise foreign rule and construct narratives of indigenous inferiority. The "civilising mission" was enacted through exhibitions of "primitive" artefacts, through the classification of colonised peoples as peoples without history, and through the physical removal of cultural treasures to metropolitan museums.

Post-independence states inherited these institutions and often repurposed them for nationalist projects. India, for instance, retained the Archaeological Survey of India (founded in 1861 under British rule) and expanded its mandate to protect a national heritage that would unify a diverse population. Yet these nationalist projects frequently reproduced colonial exclusions, marginalising minorities, tribal communities, and lower-caste populations whose heritage did not fit the authorised narrative.

Heritage and the Legitimation of Power:

1. National Identity and the "Official Past":

Modern nation-states have consistently mobilised heritage to naturalise their existence and legitimise their authority. Museums, monuments, and historic sites narrate a version of the national past that emphasises continuity, unity, and shared destiny. The country house in England, as Smith (2006) notes, was presented as embodying the "quintessence of Englishness," erasing the labour and colonial wealth that made such estates possible. Visitors to stately homes were invited to admire the taste and refinement of the aristocracy, not to inquire into the origins of their fortunes.

In India, the Archaeological Survey of India manages over 3,600 protected monuments. The selection and interpretation of these sites reflect particular priorities. Ancient temples and Mughal architecture receive sustained attention; sites associated with lower-caste communities, tribal populations, or women's history remain underrepresented. Heritage here functions as a mechanism of selective memory, producing a national identity that is simultaneously inclusive (the "glorious past" available to all citizens) and exclusive (marginalising those whose heritage does not fit the narrative).

The Indian case also illustrates the religious dimensions of heritage politics. The Babri Masjid–Ram Janmabhoomi dispute, culminating in the demolition of the mosque in 1992 and the construction of a temple in 2024, demonstrates how heritage claims can mobilise majoritarian identities and marginalise minorities. Here heritage was not a matter of preservation but of appropriation and displacement.

2. Colonial Heritage and Its Afterlives:

Colonial powers left behind not only physical infrastructure but institutional frameworks for managing heritage. The very concept of "heritage" as a discrete domain of state intervention is a colonial inheritance in many parts of the world. Museums established to display "native artifacts" to European audiences were transformed after

independence into national museums, but their classificatory systems and collection practices often retained colonial logics.

The Elgin (Parthenon) Marbles, held by the British Museum since 1816, exemplify these unresolved tensions. Greece's demands for repatriation challenge the universalist claims of encyclopedic museums—themselves products of imperial collecting—and raise fundamental questions about who owns the past. As Gillman (2026) argues, such disputes map onto broader philosophical tensions between cosmopolitan and nationalist approaches to cultural property. Cosmopolitanism holds that cultural treasures belong to humanity and should be accessible to all; nationalism holds that they belong to the communities that produced them. Neither position is innocent: cosmopolitanism can reproduce imperial logics of appropriation, while nationalism can slip into exclusionary essentialism.

The repatriation of human remains—from the skulls collected by nineteenth-century race scientists to the remains of Aboriginal Australians held in British museums—has become a particularly charged arena. These returns are not merely about property but about dignity, sovereignty, and the acknowledgement of historical violence.

Heritage as Counter-Narrative: Identity from Below

1. Subaltern Heritage and the Politics of Recognition:

If heritage can serve power, it can also challenge it. Communities excluded from official narratives have consistently mobilised their own heritage practices—oral histories, commemorations, cultural performances—to assert alternative identities. These practices constitute what Paul Shackel (2003), drawing on Patricia Hill Collins, terms an "outsider within" perspective: a way of knowing that emerges from marginalised positions and refuses the terms of the dominant discourse.

Subaltern heritage is not simply the "unofficial" counterpart of authorised heritage. It often operates according to different logics: oral rather than textual, performative rather than monumental, communal rather than expert-mediated. It may be invisible to state institutions precisely because it does not conform to the AHD's criteria. And yet it sustains identities that official heritage would erase.

2. South Africa: Heritage After Apartheid:

In South Africa, after the end of apartheid in 1994, heritage became a central site for renegotiating national identity. Sites associated with the struggle against apartheid—Robben Island, the Hector Pieterson Memorial, Constitution Hill—were incorporated into official heritage. Robben Island, where Nelson Mandela was imprisoned for eighteen years, was declared a UNESCO World Heritage Site in 1999, becoming a global symbol of resistance to oppression.

This incorporation was itself contested. Did institutionalisation neutralise the radical potential of these sites, or did it provide resources for ongoing struggles against inequality? Critics argued that heritage tourism risked commodifying the struggle, transforming it into a spectacle for foreign visitors while the material conditions of the poor remained unchanged. Defenders countered that official recognition affirmed the dignity of those who had suffered and provided a platform for ongoing activism.

The South African case also illustrates the tension between reconciliation and justice. The post-apartheid heritage framework sought to include all South Africans in a shared national story. Yet this inclusive narrative risked flattening the differences between perpetrators and victims, between those who benefited from apartheid and those who suffered under it.

3. Australia: Aboriginal Heritage and the Politics of Recognition:

In Australia, Aboriginal and Torres Strait Islander peoples have long contested the ways their heritage is represented by state institutions. The 1992 Mabo decision, which recognised native title, and the 1997 Bringing Them Home report on the

Stolen Generations marked significant shifts in official acknowledgement of historical injustice. Yet heritage practice has been slower to change.

Uluru (Ayers Rock) offers a particularly instructive case. Long marketed as a tourist destination, the site was returned to its traditional owners, the Anangu, in 1985. In 2019, climbing the rock was banned at the request of the traditional owners. This decision was controversial among some non-Indigenous Australians, who saw it as a restriction on their access to a national icon. The controversy reveals the tension between two conceptions of heritage: one in which heritage is a national resource available to all citizens, and one in which heritage is the property of specific communities with the right to determine its use.

The Anangu's framing of Uluru as a living cultural landscape—not a monument but a place of ongoing significance—also challenges the AHD's materialist bias. Their heritage is not primarily about the rock itself but about the stories, laws, and practices associated with it. Protecting the rock while ignoring the people would be, on this view, a form of heritage without heritage.

Policy, Pluralism, and Their Limits:

1. The Burra Charter:

The Burra Charter, adopted by Australia ICOMOS in 1979 and revised several times since, represents a significant attempt to move beyond the AHD. Its emphasis on "cultural significance" and its recognition that "places may have a range of values for different individuals or groups" (Australia ICOMOS, 2013, Article 1.2) signalled a shift toward pluralistic heritage assessment. The Charter requires that heritage decisions consider the values of all stakeholders, not only experts.

Yet the Charter's implementation has been uneven. As Waterton, Smith, and Campbell (2006) argue, the Charter's discourse has been adopted in policy documents while its radical implications have been contained. The AHD "has been dismantled in principle while remaining largely intact in practice" (p. 340). Expertise continues to dominate decision-making, and community consultation is often reduced to tokenism.

2. The 2003 UNESCO Convention on Intangible Cultural Heritage:

The 2003 UNESCO Convention on Intangible Cultural Heritage further institutionalised the turn toward pluralism. By recognising oral traditions, rituals, and traditional knowledge as heritage, it opened space for communities whose cultural practices had been dismissed or exoticised. The Convention's emphasis on community participation and its rejection of a "masterpieces" approach represented a genuine shift in international heritage policy.

Yet the Convention also revealed new tensions. The process of "listing" intangible heritage requires communities to define their boundaries and codify practices that are often fluid and context-dependent. Anthropologists have noted that this process can freeze cultural practices, transforming living traditions into static "inventories" (Kirshenblatt-Gimblett, 2004). Moreover, the Convention's framework remains embedded in state structures—national governments nominate candidates, and recognition often serves nationalist agendas as much as community empowerment.

The Convention's limitations are not reasons to abandon it. They are reasons to approach it critically, attending to the power relations it may reproduce even as it seeks to include.

Conclusion: Toward a Democratic Heritage Practice:

The relationship between heritage and identity is neither simple nor stable. Heritage is a discourse that produces identities, not merely a reflection of them. It operates simultaneously as a tool of domination and as a resource for resistance. Any account that emphasises only one dimension will be incomplete.

This has several implications for heritage policy and practice.

First, heritage practitioners must recognise that their work is inherently political. Decisions

about what to preserve, how to interpret, and whom to involve are not technical matters but value-laden choices that shape collective memory and identity. Pretending otherwise does not make heritage apolitical; it merely disguises its politics.

Second, pluralistic frameworks like the Burra Charter and the UNESCO Intangible Heritage Convention represent progress but are insufficient without critical attention to power. Inclusion is not merely a matter of adding marginalised voices to existing structures; it may require transforming those structures. As Waterton et al. (2006) suggest, the AHD may have been dismantled in principle while remaining intact in practice. Genuine pluralism requires redistributing the power to define heritage, not merely consulting those who have been excluded.

Third, the identity outcomes of heritage engagement are complex and unpredictable. Research on heritage tourism suggests that visits to heritage sites can strengthen existing group identities, facilitate hybrid identities, or catalyse new affiliations depending on context and interpretation (Smith, 2006). Identity is not passively received from heritage but actively negotiated through it.

Fourth, a democratic heritage practice would embrace contestation rather than seeking to resolve it. The goal should not be a single, consensual narrative but a space where multiple pasts and multiple identities can be acknowledged without closure. This is what Chantal Mouffe (2005) calls an "agonistic" politics: a politics that recognises conflict as legitimate and seeks to channel it productively rather than eliminate it.

In conclusion, heritage is best understood not as a repository of the past but as an arena of the present—a space where communities struggle over the meanings that constitute who they are. Recognising this does not diminish heritage's value; it clarifies what is at stake. A truly democratic heritage would be one that makes space for the contestation through which identities are made and remade, rather than one that imposes a single authorised version of who we have been and who we must be.

References:

1. Anderson, B. (1983). Imagined communities: Reflections on the origin and spread of nationalism. Verso.
2. Australia ICOMOS. (2013). The Burra Charter: The Australia ICOMOS Charter for Places of Cultural Significance. Australia ICOMOS.
3. Gillman, D. (2026). The idea of cultural heritage: A liberal perspective (3rd ed.). Cambridge University Press.
4. Hall, S. (1990). Cultural identity and diaspora. In J. Rutherford (Ed.), Identity: Community, culture, difference (pp. 222–237). Lawrence &Wishart.
5. Kirshenblatt-Gimblett, B. (2004). Intangible heritage as metacultural production. Museum International, 56(1–2), 52–65.
6. Lowenthal, D. (1998). The heritage crusade and the spoils of history. Cambridge University Press.
7. Mouffe, C. (2005). On the political. Routledge.
8. Shackel, P. A. (2003). Memory in black and white: Race, commemoration, and the post-bellum landscape. AltaMira Press.
9. Smith, L. (2006). Uses of heritage. Routledge.
10. UNESCO. (2003). Convention for the Safeguarding of the Intangible Cultural Heritage. UNESCO.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Nota, Abstention, and Apathy: Rethinking Electoral Non-Participation as Political Expression in Indian Democracy

Dr. Panchama S. N.
Assistant Professor,
JSS Law College Autonomous, Mysore.
Corresponding Author – Dr. Panchama S. N.

DOI - 10.5281/zenodo.23058786

Abstract:

Democratic participation is conventionally associated with voting, political engagement, and the selection of representatives. Consequently, non-participation in elections is often interpreted as an indication of political apathy, disengagement, or declining democratic commitment. However, such an interpretation may overlook the diverse motivations underlying citizens decisions not to participate or to reject available electoral choices. This paper examines NOTA (None of the Above), abstention, and political apathy as distinct yet interconnected forms of non-participation in Indian democracy. It argues that electoral non-participation should not be understood as a homogeneous phenomenon, since it may arise from political indifference, structural barriers, dissatisfaction with candidates, distrust of political institutions, or conscious political refusal. The paper conceptualizes NOTA as a form of "participation through rejection", occupying an important space between conventional political participation and non-participation. Using a qualitative and conceptual approach supported by electoral data, judicial developments, and existing scholarship on political participation, the paper explores whether non-participation can function as political expression. It concludes that while not every act of non-participation represents dissent, deliberate abstention and NOTA can provide meaningful channels for expressing dissatisfaction. The paper consequently argues for a broader understanding of democratic participation that recognises both the politics of choosing and the politics of refusing to choose.

Keywords: NOTA, Abstention, Political Apathy, Political Participation, Electoral Politics, Political Expression, Indian Democracy.

Introduction:

Democracy is fundamentally associated with the participation of citizens in the political process. Among the various forms of political participation, voting remains one of the most significant mechanisms through which citizens express their preferences, influence the selection of representatives, and contribute to the functioning of representative government. In electoral democracies such as India, voter turnout is consequently regarded as an important indicator of democratic participation. However, the conventional emphasis on voting tends to create a binary understanding of political engagement: citizens are often perceived either as participants who vote or as non-participants who abstain. Such an approach may overlook the complex political meanings that can exist behind electoral non-participation. A citizen who does not vote may be politically indifferent, dissatisfied with the available choices, prevented by practical or structural circumstances, or deliberately refusing to endorse any candidate.

Political participation, therefore, cannot be understood exclusively through the act of voting. Political scientists have long recognized that participation includes a wide range of activities through which citizens attempt to influence political

processes[1]. From this broader perspective, electoral non-participation requires a more nuanced examination. In particular, it is important to distinguish between political apathy, abstention, and deliberate electoral rejection. Political apathy generally implies a lack of interest or motivation towards politics, whereas abstention refers to the decision not to cast a vote. Abstention, however, does not necessarily originate from apathy. It may also be a conscious response to dissatisfaction with political parties, candidates, electoral choices, or the political system itself.

The introduction of NOTA (None of the Above) in Indian elections has added a new dimension to this debate. In 2013, the Supreme Court of India, in *People's Union for Civil Liberties v. Union of India*[2], directed the Election Commission to provide voters with the option of indicating that they did not wish to vote for any of the candidates contesting an election. The Court associated this choice with the voter's freedom of expression and the importance of maintaining secrecy in the electoral process. NOTA consequently created a formal institutional mechanism through which dissatisfaction could be expressed without requiring voters either to support an undesirable candidate or to remain absent from the electoral process.

The significance of NOTA lies precisely in this apparent contradiction. A NOTA voter participates in the electoral process while simultaneously rejecting all available candidates. It can therefore be understood as "participation through rejection." Unlike ordinary abstention, which may have multiple and often indeterminate causes, a NOTA vote is a recorded electoral choice. Nevertheless, NOTA should not automatically be interpreted as an act of political protest. Voters may select NOTA for different reasons, and electoral statistics alone cannot establish individual motivations.

Against this background, the present paper examines NOTA, abstention, and apathy as different forms of non-participation in Indian democracy. It questions the assumption that electoral non-participation necessarily represents democratic disengagement and explores whether certain forms of non-participation can instead constitute meaningful political expression[3]. The paper argues that non-participation is a heterogeneous phenomenon and that a comprehensive understanding of democratic participation must account not only for citizens' willingness to choose political representatives, but also for their capacity and willingness to refuse the choices presented to them.

Conceptual and Theoretical Framework:

Understanding NOTA, abstention, and apathy requires a broader conceptualisation of political participation. Political participation is generally understood as the activities through which citizens seek to influence governmental decision-making and the selection of political representatives. Voting is perhaps the most institutionalised form of participation in representative democracies, but it is not the only one. Citizens may participate through political parties, election campaigns, political discussions, demonstrations, contacting representatives, civil society organisations, and other forms of collective or individual political action. Verba, Nie and Kim emphasise that political participation encompasses activities through which citizens attempt to influence the selection of governmental personnel and policies[4]

Non-participation can be understood as the absence of involvement in a particular political

[1]Verba, S., Nie, N. H., & Kim, J.-o. (1978). *Participation and political equality: A seven-nation comparison*. Cambridge University Press.
[2]People's Union for Civil Liberties v. Union of India, (2013) 10 SCC 1.
[3]*Id.* at 15–16.
[4]"Verba, Nie and Kim emphasise that political participation encompasses activities through which citizens attempt to influence the selection of governmental personnel and policies."

activity. However, non-participation does not necessarily have a single cause or meaning. A citizen may fail to participate because of a lack of interest, distrust of political institutions, dissatisfaction with political alternatives, lack of information, geographical or administrative barriers, personal circumstances, or a deliberate decision to withdraw from the electoral process. Therefore, treating all non-participation as political apathy risks overlooking important differences in citizens' political motivations.[5]

Political apathy refers primarily to a lack of interest, concern, or motivation regarding political affairs. An apathetic citizen may perceive politics as irrelevant to their everyday life or may believe that their individual participation cannot produce meaningful change. In this sense, apathy represents a form of political disengagement. However, the absence of voting should not automatically be interpreted as evidence of apathy. A person may possess substantial political awareness and still decide not to vote because none of the available candidates or parties adequately represents their preferences. The behavioural outcome is the sameno conventional vote is castbut the political meaning is substantially different.

This distinction leads to the concept of abstention. Abstention generally refers to the decision not to participate in an election despite possessing the formal opportunity to do so. Abstention can be passive or deliberate. Passive abstention may emerge from indifference, lack of political knowledge, or weak political interest. Deliberate abstention, on the other hand, may represent dissatisfaction or rejection. The distinction is important because it demonstrates that non-voting cannot be interpreted solely through observable behavior. The same act of not voting may conceal very different political motivations.

The distinction between apathy and abstention can therefore be expressed as follows: apathy primarily concerns a person's relationship with politics, whereas abstention concerns a person's behaviour in relation to a particular political process. A person may be politically interested but electorally abstain. Conversely, an individual may participate in an election without possessing a strong interest in politics. Consequently, political behaviour should be interpreted within its wider social and political context rather than through turnout figures alone.

The concept of NOTA None of the Above adds another dimension to this theoretical framework. Unlike conventional abstention, NOTA requires the citizen to enter the electoral process and actively register a rejection of all the available candidates. It therefore occupies a distinctive position between participation and non-participation. The voter participates procedurally while refusing to make a conventional candidate choice. This makes NOTA an important example of what may be described as "participation through rejection."[6]

The theoretical significance of such rejection can also be understood through Albert O. Hirschman's distinction between exit and voice. Hirschman argues that dissatisfied individuals may respond to declining conditions either by withdrawing from an organisation or institution ("exit") or by attempting to communicate their dissatisfaction and demand change ("voice")[7] Applying this framework to electoral politics, abstention may sometimes resemble "exit," as citizens withdraw from the electoral process rather than endorse an available alternative. NOTA, by contrast, provides a formalized avenue for "voice": citizens remain within the electoral process but communicate their refusal to support any of the candidates.

[5]See Verba, Schlozman & Brady, *supra* note 1.

[6]Sidney Verba, Kay Lehman Schlozman & Henry E. Brady, *Voice and Equality: Civic Voluntarism in American Politics* (Harvard University Press 1995).

[7]Albert O. Hirschman, *Exit, Voice, and Loyalty: Responses to Decline in Firms, Organizations, and States* (Harvard University Press 1970).

Evolution and Institutionalization of NOTA in India:

The emergence of NOTA in India represents an important development in the country's electoral and constitutional framework. Before the introduction of NOTA, voters who did not wish to support any of the candidates did not have a separate option on the ballot through which their rejection could be formally recorded. Although the electoral framework provided a mechanism for a voter to indicate unwillingness to vote for any candidate, the procedure raised concerns regarding the secrecy of the voter's choice. This issue became particularly significant in relation to the principles of free and fair elections and the freedom of political expression.[8]

The issue was brought before the Supreme Court of India in *People's Union for Civil Liberties (PUCL) v. Union of India*. The petition challenged the existing electoral procedure on the ground that it compromised the secrecy of a voter who did not wish to vote for any of the contesting candidates. In its judgment delivered on 27 September 2013, the Supreme Court directed the Election Commission of India to introduce a separate "None of the Above" (NOTA) option on electronic voting machines and ballot papers. The Court emphasized that secrecy of the ballot should be maintained even when a voter chooses not to support any candidate and connected this right with the broader constitutional protection of freedom of expression under Article 19(1)(a).[9]

The importance of the judgment lies in the transformation of electoral rejection from an ambiguous form of non-participation into a formally recognized electoral choice. The Supreme Court observed that voters should have the freedom to express their unwillingness to vote for any candidate without revealing their electoral preference. The Court therefore directed the Election Commission to provide a separate button for NOTA on Electronic Voting Machines (EVMs), thereby allowing citizens to participate in the electoral process while simultaneously rejecting all available candidates.

Following the Supreme Court's judgment, NOTA was introduced into the Indian electoral system. The option was first implemented during elections to several State Legislative Assemblies in 2013 and subsequently became available in the 2014 Lok Sabha election. The 2014 general election was therefore an important milestone because it enabled voters across the country to formally register their rejection of all candidates without abstaining from the voting process.[10]

The institutionalization of NOTA created a new category of electoral behavior in India. A voter selecting NOTA does not simply remain outside the electoral process; rather, the voter actively enters the polling process and records an unwillingness to support any candidate. NOTA can consequently be understood as a form of "participation through rejection." This distinguishes NOTA from ordinary abstention because abstention leaves the reason for non-voting largely indeterminate, whereas a NOTA vote provides an observable and officially recorded indication that the voter did not wish to select any of the available candidates.[11]

This distinction is crucial for understanding the political significance of NOTA. Its introduction acknowledges that citizens may have political preferences that cannot be reduced to choosing one among the available candidates. At the same time, the absence of a direct electoral consequence means that NOTA primarily communicates dissatisfaction rather than determining the outcome of an election.

The development of NOTA in India can therefore be viewed as more than a technical modification of the voting process. It represents an expansion of the concept of electoral expression by recognising the citizen's right to reject all available political alternatives while remaining within the formal democratic process. NOTA thus occupies an

[8] Hirschman, *supra* note 6.
[9] *Id.* at 15–16.
[10] Election Commission of India, Atlas: Lok Sabha Elections 2024 (2025).
[11] Election Commission of India, Handbook for Returning Officers.

interesting position between participation and non-participation: the voter participates in the act of voting but refuses to participate in the selection of any particular candidate. This paradox provides an important foundation for examining whether non-participation and electoral rejection should necessarily be interpreted as political apathy or whether they can also constitute meaningful forms of political expression.

NOTA, Abstention and Apathy: Distinguishing Forms of Non-Participation:

Non-participation in electoral politics is often treated as a single category, particularly when political engagement is measured primarily through voter turnout. However, such an approach overlooks the different motivations, circumstances, and political meanings associated with electoral non-participation. A citizen who does not vote may be indifferent towards politics, dissatisfied with the available candidates, prevented from voting by practical or structural circumstances, or consciously seeking to express political rejection. Therefore, understanding non-participation requires a clear distinction between political apathy, abstention, and deliberate electoral rejection.

Political Apathy:

Political apathy can broadly be understood as a lack of interest, concern, or motivation towards political affairs. It represents a condition in which individuals do not consider political participation sufficiently important to justify their involvement. Political apathy may arise from a perception that political institutions are distant from citizens' everyday lives or that individual participation has little capacity to influence political outcomes. Political participation is influenced by resources such as time, money, civic skills, political interest, and social networks, which means that individuals do not possess equal opportunities or motivations to participate. [12]

In the context of elections, apathy may manifest itself through a conscious lack of interest in voting. An apathetic citizen may neither actively support a candidate nor deliberately reject the available electoral alternatives. The individual may simply perceive the electoral process as irrelevant, ineffective, or unimportant. Consequently, political apathy represents primarily disengagement from politics, rather than a deliberate political message.

However, it would be problematic to assume that every individual who does not vote is politically apathetic. Such an assumption treats a behavioural outcome as if it automatically reveals an individual's political motivation. The failure to vote can have several causes that have little relationship with political interest. Geographical mobility, employment responsibilities, registration difficulties, migration, physical accessibility, or other personal and institutional barriers may prevent an otherwise politically engaged citizen from voting. Therefore, low voter turnout cannot, by itself, provide sufficient evidence of political apathy.

Abstention as a Form of Non-Participation:

Abstention refers more specifically to the act of not voting in an election. Unlike apathy, which describes an individual's relationship with politics, abstention describes a particular electoral behaviour. A person may abstain because of political indifference, but abstention may also be a conscious and politically motivated decision.

This distinction is important because deliberate abstention can sometimes function as a form of protest. Citizens may refuse to vote because they believe that none of the political parties or candidates adequately represents their interests, because they distrust political institutions, or because they wish to communicate dissatisfaction with the political system. Political abstention can therefore occupy an ambiguous position: it may indicate withdrawal from politics, but it may also

[12]Verba, Schlozman & Brady, *supra* note 5.

communicate rejection of the available political alternatives.[13]

Albert O. Hirschman's distinction between "exit" and "voice" provides a useful theoretical framework for understanding this ambiguity. Hirschman argues that dissatisfied individuals may respond to declining conditions either by withdrawing from an organisation or institution or by remaining within it and expressing their dissatisfaction. Applied to electoral politics, abstention may resemble "exit", since the citizen withdraws from the act of voting. However, when abstention is consciously undertaken as a political boycott, it can also function as a form of political "voice."

The difficulty lies in determining the motivation behind abstention. Unlike a vote for a candidate or a NOTA vote, ordinary non-voting does not ordinarily provide a direct indication of why an individual stayed away from the polling process. Electoral statistics can therefore demonstrate the scale of non-voting but cannot, by themselves, determine whether abstention represents apathy, protest, structural exclusion, or practical inability to vote.

NOTA as Deliberate Electoral Rejection:

NOTA differs significantly from both political apathy and ordinary abstention. A voter who selects NOTA physically participates in the electoral process and deliberately records a choice indicating that none of the available candidates is acceptable. The Supreme Court of India recognised the importance of providing such an option so that voters could express their unwillingness to vote for any candidate while maintaining the secrecy of their ballot

The significance of NOTA can also be understood in relation to the concept of freedom of expression. The Supreme Court's decision recognised that a voter should be able to express unwillingness to support any candidate without compromising the secrecy of the ballot. Consequently, NOTA provides citizens with an institutional mechanism through which dissatisfaction can be communicated without requiring them to select a candidate they do not support.

At the same time, NOTA should not automatically be equated with political protest. A NOTA vote does not reveal the precise reason why the voter rejected all candidates. Some voters may use NOTA because of dissatisfaction with candidates or political parties, while others may select it for ideological, strategic, or personal reasons. Thus, NOTA should be understood as a potential expression of political dissatisfaction, rather than definitive evidence of protest.

NOTA and Electoral Non-Participation in India: Evidence and Analysis:

The introduction of NOTA has made electoral rejection more visible within the Indian electoral system. Unlike ordinary abstention, which can only be observed indirectly through turnout figures, NOTA votes are separately recorded by the Election Commission of India. This provides an important empirical basis for examining whether a section of the electorate participates in elections while simultaneously refusing to endorse any of the candidates. The available electoral data, however, must be interpreted carefully because the number of NOTA votes alone cannot establish the motivations of individual voters.

The 2014 Lok Sabha election was the first general election in India in which NOTA was available to voters across the country following its introduction pursuant to the Supreme Court's 2013 judgment. NOTA received approximately 60 lakh votes, accounting for around 1.1 per cent of the total votes polled in the election. The figure demonstrated that a measurable section of the electorate preferred to participate in the election while refusing to select any of the contesting candidates.

[13]See Hirschman, *supra* note 6

The 2019 Lok Sabha election provided further evidence of the persistence of this form of electoral behaviour. NOTA received approximately 65.23 lakh votes, representing around 1.06 per cent of the votes polled. Although the percentage was relatively small when compared with the total votes cast, the absolute number is significant because it represents millions of individual electoral decisions. NOTA had therefore moved beyond being merely a theoretical provision and had become an identifiable component of electoral behaviour in India.

The 2024 Lok Sabha election provides another important point of comparison. According to the Election Commission of India, NOTA received approximately 63.72 lakh votes, accounting for about 0.99 per cent of the total votes polled. The proportion was slightly lower than in 2019, despite the larger electorate and higher absolute number of votes cast. Such changes indicate that NOTA usage can fluctuate across elections and should not automatically be interpreted as a linear increase or decline in political dissatisfaction.

The data also demonstrate the importance of examining NOTA geographically. NOTA votes are not distributed uniformly across India, and variations can be observed between States and constituencies. In the 2024 Lok Sabha election, Bihar recorded the highest number of NOTA votes among the States and Union Territories, with approximately 8.99 lakh NOTA votes. Such regional variations raise important questions about the relationship between electoral competition, candidate selection, political dissatisfaction, social conditions, and NOTA behaviour.

However, the empirical interpretation of NOTA presents a methodological challenge. A high number of NOTA votes in a constituency cannot automatically be described as evidence of widespread political protest. A voter may select NOTA because they consider all candidates unacceptable, because they are dissatisfied with political parties, because they wish to make a symbolic statement, or because they have another individual reason for rejecting the available options. Electoral statistics do not provide sufficient information to distinguish between these motivations.

For this reason, NOTA data should be interpreted alongside broader indicators of political participation and electoral behaviour. Voter turnout provides information about participation in the electoral process, whereas NOTA provides information about rejection among those who participate. These indicators measure different aspects of political behaviour. A constituency with high turnout and high NOTA may represent a politically engaged electorate that is dissatisfied with the available candidates. Conversely, low turnout and low NOTA could indicate either political apathy or other forms of exclusion. Therefore, neither turnout nor NOTA should be interpreted in isolation.[14]

The relationship between turnout and NOTA is particularly useful for understanding the distinction between apathy and dissatisfaction. If a citizen does not vote, the electoral system cannot easily establish whether that person is indifferent or dissatisfied. A NOTA voter, however, has taken the additional step of entering the electoral process and recording a rejection. This makes NOTA a more visible form of negative electoral expression than ordinary abstention.

At the same time, the relatively small proportion of NOTA votes in national elections should not be exaggerated. The data do not suggest that a majority of Indian voters reject all candidates. On the contrary, the overwhelming majority of voters continue to select particular candidates or political parties. The significance of NOTA therefore lies less in its numerical dominance and more in the fact that it creates a formally recognised category for voters who do not wish to endorse any candidate.

[14] *People's Union for Civil Liberties v. Union of India*, *supra* note 2.

The institutional consequences of NOTA also need to be considered when interpreting its significance. The Election Commission counts NOTA votes separately, but NOTA does not ordinarily determine the winner of an election. Even if NOTA receives more votes than every individual candidate, the election is not automatically cancelled and a fresh election is not ordinarily required solely on that basis. Consequently, the political meaning of NOTA is primarily expressive rather than outcome-determinative.

This distinction creates an interesting relationship between political expression and institutional power. NOTA allows citizens to communicate rejection, but the electoral system does not necessarily convert that rejection into a change in representation. In other words, the citizen possesses the ability to speak through the ballot, but the institutional consequences of that speech remain limited. This raises a broader question concerning the responsiveness of representative democracy: should democratic institutions merely provide citizens with mechanisms for expressing dissatisfaction, or should substantial levels of rejection produce institutional consequences?

The empirical evidence therefore supports a more cautious but significant conclusion. NOTA demonstrates that participation and rejection are not mutually exclusive categories. A citizen can participate in an election precisely to communicate that none of the available candidates is acceptable. This complicates the conventional understanding of political participation and strengthens the argument that electoral behaviour must be examined not only in terms of whom citizens choose, but also in terms of whomand whatthey consciously refuse to endorse.[15]

Challenges and Limitations of Understanding Non-Participation as Political Expression:

Although NOTA, abstention, and other forms of electoral non-participation can potentially function as political expressions, interpreting them exclusively as forms of political protest presents several conceptual and empirical challenges. A nuanced understanding of non-participation must recognise that similar electoral behaviour may emerge from very different motivations and circumstances. Therefore, the argument that non-participation can constitute political expression should not be understood as suggesting that all forms of non-participation are politically meaningful.

The first limitation concerns the ambiguity of abstention. When a registered voter does not cast a vote, it is difficult to determine the reason for that decision from electoral data alone. Abstention may result from political dissatisfaction, but it may equally arise from political apathy, lack of information, personal circumstances, migration, employment, administrative difficulties, or other barriers to participation. Political participation is shaped by individual resources and circumstances, including time, civic skills, political interest, and social networks. Consequently, the category of "non-voter" contains individuals whose political attitudes may be fundamentally different from one another.[16]

A second limitation concerns the interpretation of NOTA votes. Although NOTA represents an explicit electoral choice, the choice itself does not reveal the precise motivation of the voter. A person may select NOTA because of dissatisfaction with all candidates, distrust of political parties, ideological disagreement, dissatisfaction with the political system, or a desire to make a symbolic statement. Therefore, NOTA figures should not automatically be interpreted as evidence of political protest. The Election Commission's electoral statistics can identify the number of NOTA votes but cannot independently establish the intentions behind individual choices.

Third, non-participation may result from structural exclusion rather than political

[15] Election Commission of India, *General Election to Lok Sabha 2014: Statistical Report*.

[16] Election Commission of India, *Atlas: Lok Sabha Elections 2024* (2025).

choice. Citizens may face practical difficulties in accessing polling stations, maintaining electoral registration, travelling to their constituency, or participating because of employment and migration. Such circumstances are particularly relevant in a large and socially diverse democracy such as India.

Fourth, there is a limitation concerning the institutional consequences of NOTA. The introduction of NOTA provides voters with a formal mechanism for rejecting all candidates, but such rejection does not ordinarily invalidate an election. The candidate receiving the highest number of votes among the contesting candidates is generally declared elected, even where NOTA receives a substantial number of votes. Consequently, there is a gap between electoral expression and electoral consequence. Citizens can formally communicate dissatisfaction, but the electoral system does not necessarily translate that dissatisfaction into a change in candidates or a fresh election.

This limitation raises an important question about the democratic effectiveness of NOTA. If a voter knows that selecting NOTA will not affect the final result, the option may be understood primarily as a symbolic mechanism. Nevertheless, symbolic political expression should not necessarily be dismissed as politically insignificant. Political communication can influence public discourse, political parties, civil society organisations, and future electoral strategies even when it does not immediately change an electoral outcome. The broader significance of NOTA may therefore lie in its ability to make dissatisfaction more visible rather than directly determining who wins an election.

Finally, there is a methodological limitation in distinguishing individual and collective political expression. A single NOTA vote may represent an individual decision with no collective political intention. Similarly, an individual who abstains may not necessarily be participating in an organised boycott. Political protest becomes more clearly identifiable when non-participation is coordinated, publicly articulated, and associated with specific political demands. Therefore, the political meaning of non-participation depends partly on the context in which it occurs.

These limitations do not invalidate the argument that non-participation can constitute political expression. Rather, they demonstrate the need for a more careful interpretation. Non-participation should be treated as a heterogeneous category, containing both politically meaningful choices and forms of disengagement or exclusion. NOTA, in particular, provides stronger evidence of an intentional electoral act than ordinary abstention, but even NOTA cannot reveal the complete motivations of individual voters.

The central challenge, therefore, is to move beyond a simplistic understanding in which voting equals participation and non-voting equals apathy. Such a binary approach fails to capture the complexity of democratic behaviour. A more nuanced framework recognises different degrees and forms of engagement, ranging from political apathy and involuntary non-participation to deliberate abstention and institutionalised electoral rejection through NOTA. This approach allows the democratic significance of non-participation to be examined without romanticising or overstating its political meaning.

Conclusion:

The relationship between democratic participation and non-participation is more complex than the conventional distinction between voters and non-voters suggests. In a representative democracy, voting is undoubtedly an important form of political participation, but the absence of voting cannot automatically be interpreted as political apathy or democratic disengagement. Political participation encompasses a wider range of activities through which citizens attempt to influence political processes, while the decision not to participate may emerge from diverse political, social, institutional, and personal circumstances.

The distinction between apathy, abstention, and NOTA is consequently central to understanding the political meaning of non-participation. Political

apathy reflects a lack of interest or motivation towards political affairs, whereas abstention refers to the decision not to participate in a particular election. Abstention may be passive and motivated by indifference, but it may also represent a conscious refusal to endorse the available political alternatives. NOTA occupies a different position because it enables citizens to participate in the electoral process while explicitly refusing to support any of the candidates.

The Supreme Court's decision in *People's Union for Civil Liberties v. Union of India* was an important development in this regard. The Court directed the Election Commission of India to provide a separate NOTA option so that voters could express their unwillingness to vote for any candidate while maintaining the secrecy of their ballot The Court also connected this electoral choice with the constitutional protection of freedom of expression under Article 19(1)(a). NOTA consequently transformed electoral rejection into a formally recognised component of the voting process.

This argument can also be understood through Albert O. Hirschman's distinction between “exit” and “voice.” A dissatisfied individual may withdraw from an institution or remain within it and express dissatisfaction. Ordinary abstention may sometimes resemble “exit” because the citizen withdraws from the voting process, whereas NOTA can be understood as a form of institutionalised “voice” because the citizen remains within the electoral process while communicating rejection.

The empirical presence of NOTA in successive Indian elections nevertheless demonstrates that electoral rejection has become a measurable component of voting behaviour. NOTA received approximately 60 lakh votes in the 2014 Lok Sabha election. In the 2019 Lok Sabha election, NOTA received approximately 65.23 lakh votes, constituting around 1.06 per cent of the votes polled. In the 2024 Lok Sabha election, approximately 63.72 lakh votes were recorded under NOTA, accounting for around 0.99 per cent of the votes polled.

These figures do not establish that all NOTA voters were protesting against the political system. Nevertheless, they demonstrate that millions of voters have used an institutional mechanism to reject the available candidates while remaining within the electoral process. The significance of NOTA should therefore not be assessed exclusively in terms of whether it represents a large percentage of votes. Its importance also lies in making electoral rejection visible and distinguishable from ordinary non-voting.

A significant limitation, however, remains the restricted institutional consequence of NOTA. Although NOTA votes are separately recorded and counted, a high number of NOTA votes does not ordinarily invalidate an election or require a fresh election. The candidate securing the highest number of votes among the contesting candidates is generally declared elected. Thus, there exists a gap between the expressive power of NOTA and its institutional power. Citizens can communicate rejection, but that rejection does not necessarily produce a direct change in electoral outcomes.

This limitation raises a broader question concerning democratic responsiveness. If citizens are given the right to reject all available candidates, should substantial rejection have consequences for candidate selection, political parties, or the validity of an election? The present system primarily treats NOTA as an expressive mechanism rather than an outcome-determining mechanism. Nevertheless, even an expressive mechanism can have democratic significance because it makes dissatisfaction visible and provides political actors with information about the extent to which voters are dissatisfied with the available alternatives.

The central argument of this paper is therefore not that every instance of non-participation represents political protest. Rather, it is that non-participation should not automatically be equated with political apathy. The political meaning of non-participation depends upon its motivation, context, and form. Apathy represents disengagement; abstention represents non-

participation; deliberate abstention may communicate refusal; and NOTA provides an institutionalised mechanism for expressing electoral rejection.

Ultimately, democracy should be understood not merely as a system through which citizens choose representatives but also as a system that provides citizens with meaningful opportunities to communicate dissatisfaction with the choices presented to them. NOTA has expanded the vocabulary of electoral expression in India by recognising that a citizen may participate in an election without endorsing any candidate. It demonstrates that political participation does not always have to take the form of "choosing for" someone; under certain circumstances, it can also take the form of "rejecting all."

The study therefore concludes that the politics of non-participation should not simply be understood as the absence of politics. In certain contexts, refusing to choose can itself constitute a political choice. A comprehensive understanding of Indian democracy must consequently recognise both the politics of participation and the politics of rejection. The future challenge for Indian electoral democracy is not merely to increase voter turnout, but also to understand why citizens participate, why they abstain, why they choose NOTA, and whether the institutional system adequately responds to the dissatisfaction communicated through these choices.

References:

1. Election Commission of India. (2014). *General elections to Lok Sabha, 2014: Statistical reports*. Election Commission of India.
2. Election Commission of India. (2019). *General election to Lok Sabha, 2019: Statistical reports*. Election Commission of India.
3. Election Commission of India. (2024). *General election to Lok Sabha 2024: Statistical reports*. Election Commission of India.
4. Election Commission of India. (2024). *Handbook for returning officers*. Election Commission of India.
5. Election Commission of India. (2025). *Atlas: Lok Sabha elections 2024*. Election Commission of India.
6. Hirschman, A. O. (1970). *Exit, voice, and loyalty: Responses to decline in firms, organizations, and states*. Harvard University Press.
7. Kumar, R., Padmanabhan, S., & Srikant, P. (2023). NOTA: A strategic choice with a positive impact on Indian elections. *Asian Journal of Political Science, 31*(3), 180–196. https://doi.org/10.1080/02185377.2023.2265372
8. Mandal, A., Mandal, B., & Bhattacharjee, P. (2017). Does NOTA affect voter turnout? Evidence from state legislative elections in India. *Asian Journal of Economic Modelling, 5*(3), 331–341. https://doi.org/10.18488/journal.8.2017.53.331.341
9. Norris, P. (2011). *Democratic deficit: Critical citizens revisited*. Cambridge University Press.
10. People's Union for Civil Liberties v. Union of India, (2013) 10 SCC 1.
11. Plescia, C., Kritzinger, S., & Singh, S. P. (2023). Who would vote NOTA? Explaining a "none of the above" choice in eight countries. *European Journal of Political Research, 62*(1), 118–134. https://doi.org/10.1111/1475-6765.12497
12. Ujhelyi, G., Chatterjee, S., & Szabó, A. (2021). None of the above: Protest voting in the world's largest democracy. *Journal of the European Economic Association, 19*(3), 1936–1979. https://doi.org/10.1093/jeea/jvaa047
13. Verba, S., Nie, N. H., & Kim, J.-o. (1978). *Participation and political equality: A seven-nation comparison*. Cambridge University Press.
14. Verba, S., Schlozman, K. L., & Brady, H. E. (1995). *Voice and equality: Civic voluntarism in American politics*. Harvard University Press.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Contemporary Issues in Indian Democracy and Governance

Dr. Prakash H. Jogin
Principal & Head, Department of Political Science,
Soniya Arts. Science and Commerce. Degree College, Dharwad, Karnataka.
Corresponding Author – Dr. Prakash H. Jogin
DOI - 10.5281/zenodo.23058809

Abstract:

India, as the world's largest democracy, stands at a critical historical juncture where constitutional ideals intersect with rapid socio-economic, technological, and political transitions. This comprehensive academic research paper critically evaluates the contemporary landscape of Indian democracy and governance. It unpacks the complex interplay between federal institutional structures, electoral integrity, digital governance platforms, judicial federalism, and civil liberties. The paper analyzes major recent developments including the implementation of One Nation One Election proposals, the evolution of electoral financing following the supreme court judgment on Electoral Bonds, the operational impact of Digital India and AI in public service delivery, and the recalibration of Centre-State fiscal relations under current finance commissions. Furthermore, the paper examines key sociopolitical themes such as grassroots empowerment through Panchayati Raj institutions, gender political representation, administrative accountability, and the role of free media in preserving democratic ethics. By integrating empirical insights with theoretical political science frameworks, this article offers constructive policy recommendations to strengthen democratic resilience, administrative transparency, and inclusive governance in contemporary India.

Keywords: Indian Democracy, Governance, Federalism, Electoral Reforms, Digital Governance, Public Administration, Judicial Independence, Electoral Bonds.

Introduction: The Evolving Contours of Indian Democracy:

India's journey as a sovereign, socialist, secular, democratic republic represents one of the most remarkable experiments in modern political history. Framed under the visionary guidance of Dr. B.R. Ambedkar and the Constituent Assembly, the Constitution of India laid down an extraordinary blueprint for democratic governance amidst unprecedented linguistic, religious, ethnic, and socio-economic diversity. For over seven decades, Indian democracy has demonstrated exceptional resilience, surviving internal conflicts, economic transformations, regional aspirations, and institutional strains. However, the contemporary political architecture faces a distinct set of challenges and opportunities arising from globalization, technological disruption, shifts in political power dynamics, and evolving public expectations.

Contemporary democracy in India can no longer be conceptualized merely through the procedural lens of periodic free and fair elections. While democratic participation and voter turnout remain impressively high, substantive democracy demands robust institutional accountability, the protection of individual rights, fiscal justice across federal units, and efficient administrative service delivery. The overarching theme of contemporary governance in India centers on bridging the gap between constitutional promises and administrative realities. Today, citizens demand not only representative democracy but also participatory, transparent, and responsive governance.

In recent years, structural changes in the global order, accompanied by internal reform

initiatives, have profoundly altered the operational environment of Indian public administration. From the introduction of direct benefit transfers and digital public infrastructure to intense debates surrounding electoral finance, judicial appointments, and state autonomy, the discourse on governance has expanded into multidimensional domains. Political science scholars and practitioners are challenged to critically analyze these developments with empirical rigor and normative depth. This article provides a comprehensive investigation into the multifaceted dimensions of contemporary Indian governance, identifying key institutional bottlenecks while proposing strategic pathways for democratic rejuvenation.

Electoral Dynamics and Institutional Reforms:

1. Electoral Transparency and the Financing of Politics:

Elections constitute the lifeblood of democratic legitimacy. However, the integrity of the electoral process is intrinsically linked to political funding. For decades, the influence of unrecorded wealth, corporate lobbying, and opaque financial donations has posed a significant challenge to democratic equality. The introduction of the Electoral Bonds Scheme in 2018 marked a contentious turning point in political funding. Proponents argued that the scheme brought banking-channel formality and reduced cash transactions, while critics argued that it institutionalized anonymity, created asymmetric information advantages for ruling parties, and deprived voters of their fundamental right to know under Article 19(1)(a) of the Constitution.

The landmark Supreme Court judgment of February 2024, which struck down the Electoral Bonds Scheme as unconstitutional, restored a pivotal requirement for transparency in political finance. The ruling reaffirmed that political transparency is not merely a policy preference but an essential component of a vibrant democratic structure. Moving forward, Indian electoral administration faces the imperative of establishing comprehensive political finance reforms. Proposals such as partial state funding of elections, stricter caps on political party expenditure, and real-time public disclosure of campaign contributions are vital to leveling the playing field for all political participants.

2. Simultaneous Elections: The 'One Nation, One Election' Debate:

Another central debate in contemporary electoral governance is the proposal for simultaneous elections to the Lok Sabha and State Legislative Assemblies, popularly designated as 'One Nation, One Election' (ONOE). High-level committee recommendations and policy discussions advocate that holding synchronized elections would significantly reduce public expenditure, curb administrative disruption caused by the frequent enforcement of the Model Code of Conduct (MCC), and enable governments to focus on long-term policy formulation rather than continuous campaign mode.

Conversely, constitutional experts and political scientists raise serious concerns regarding the impact of simultaneous elections on federalism and regional democracy. In a federal polity like India, regional issues and state-specific priorities require distinct political arenas. Synchronized elections risk nationalizing state-level elections, potentially overshadowing regional grievances under national political narratives. Furthermore, practical challenges related to constitutional amendments (specifically Articles 83, 85, 172, 174, and 356), the logistics of Electronic Voting Machine (EVM) deployment, and handling early dissolutions of assemblies present substantial constitutional and operational hurdles. Any move toward simultaneous elections must prioritize consensus among federal units rather than top-down constitutional imposition.

3. Electoral Autonomy and the Election Commission of India:

The Election Commission of India (ECI), established under Article 324, has historically enjoyed widespread public trust for conducting massive, peaceful elections. However,

contemporary debates highlight the necessity of protecting the Commission's perceived and actual institutional independence. The procedure for appointing Election Commissioners, the enforcement mechanism of the Model Code of Conduct, and the management of voter registration technologies require unwavering impartiality. Ensuring an independent selection panel for chief election commissioners and standardizing statutory safeguards are essential steps to maintain unwavering institutional integrity.

Federalism And Centre-State Relations in A Changing Polity:

1. Cooperative, Competitive, and Friction Federalism:

Indian federalism was characterized by Sir Ivor Jennings as a federation with a strong centralizing tendency. Over decades, this model evolved into a dynamic matrix of cooperative and competitive federalism. In recent years, while competitive federalism has encouraged states to improve ease of doing business, attract investment, and innovate in public service delivery, friction federalism has also surged in key administrative areas.

Friction between the Union government and state governments frequently manifests through disagreements regarding the jurisdiction and political role of Governors, the deployment of central investigative agencies, the implementation of centrally sponsored schemes (CSS), and legislative overlaps in subjects like agriculture, education, and power. The office of the Governor, intended as a neutral constitutional bridge, has repeatedly faced scrutiny over delays in granting assent to state bills and managing floor tests during political crises. A strict adherence to the recommendations of the Sarkaria and Punchhi Commissions is indispensable to restore constitutional equilibrium.

2. Fiscal Federalism and Resource Redistribution:

Fiscal federalism remains one of the most sensitive pillars of Indian governance. The structural introduction of the Goods and Services Tax (GST) fundamentally realigned Centre-State financial relationships by pooling legislative power over indirect taxation. While GST harmonized national markets, states surrendered significant tax autonomy, making them heavily reliant on timely GST compensation, central tax devolutions, and grants-in-aid.

The terms of reference for Finance Commissions frequently spark intense federal debates regarding vertical and horizontal devolution criteria. Southern states, which have achieved lower population growth rates and higher socio-economic indicators through effective human capital investments, often voice concerns over demographic criteria in tax-sharing formulas that potentially disincentivize governance performance. Addressing fiscal asymmetric federalism requires transparent mechanisms, timely distribution of funds, and enhanced fiscal autonomy for states to address localized development goals.

Governance, Digital Transformation, And Public Service Delivery:

1. Digital Public Infrastructure (DPI) and the India Stack:

The integration of digital technology into public administration represents one of the most visible administrative achievements in modern India. The 'India Stack'—a unified layer of digital public infrastructure comprising identity (Aadhaar), payments (Unified Payments Interface - UPI), and data exchange (Account Aggregator)—has revolutionized financial inclusion and government service delivery. Millions of citizens receive state subsidies directly into their bank accounts via Direct Benefit Transfer (DBT), eliminating intermediary leakages and administrative delays.

Digital governance platforms such as PM-GatiShakti for infrastructure planning, CoWIN for

mass healthcare distribution, and GeM (Government e-Marketplace) for public procurement demonstrate how administrative efficiency can be scaled up dramatically. Digital transparency minimizes administrative discretion, curbs corrupt practices in welfare distribution, and enhances civic convenience.

2. Digital Divide, Data Privacy, and Algorithmic Inclusion:

Despite significant technological achievements, digital governance carries implicit risks if implemented without robust social safeguards. The primary challenge is the digital divide across rural-urban, gender, and socio-economic lines. Mandatory digital authentication for basic rights, such as food rations under the Public Distribution System (PDS) or employment wages under MGNREGA, has occasionally caused exclusion errors due to poor connectivity, biometric mismatch, or digital illiteracy.

Furthermore, the vast collection of citizen data necessitates strong legislative protections. The enactment of the Digital Personal Data Protection (DPDP) Act is a significant statutory step, yet its operationalization must balance citizen privacy with administrative data collection. As governance increasingly adopts Artificial Intelligence (AI) for decision-making and predictive policing, addressing algorithmic bias, surveillance concerns, and data sovereignty remains imperative.

Judicial Review, Constitutionalism, And Rule of Law:

1. The Supreme Court as the Custodian of Constitutional Morality:

In the Indian democratic structure, the judiciary serves as the ultimate interpreter of the Constitution and protector of fundamental rights. The doctrine of 'Constitutional Morality', frequently invoked by the Supreme Court, asserts that democratic governance must adhere not just to the textual letter of the law, but to its underlying spirit of liberty, equality, fraternity, and human dignity. Through active judicial intervention, the apex court has addressed complex issues surrounding electoral finance, environmental sustainability, personal liberty, and executive overreach.

2. Judicial Pendency and Administrative Access to Justice:

However, the rule of law is hampered by systemic delays within the judicial infrastructure. With over 45 million cases pending across lower courts, High Courts, and the Supreme Court, delayed justice remains a formidable barrier to citizen empowerment. Vacancies in judicial office, outdated procedural codes, and insufficient courtroom infrastructure contribute to systemic gridlock. Initiatives like e-Courts, alternative dispute resolution (ADR) mechanisms, and National Lok Adalats are crucial steps toward expediting judicial delivery and ensuring that constitutional rights are practically enforceable for every citizen.

Decentralization, Grassroots Democracy, And Inclusive Polity:

1. Revisiting Panchayati Raj and Urban Local Governance:

The 73rd and 74th Constitutional Amendment Acts of 1992 revolutionized Indian democracy by institutionalizing local self-governance at the rural and urban levels. Panchayati Raj Institutions (PRIs) and Urban Local Bodies (ULBs) brought democracy to the doorstep of citizens, creating over three million elected representatives across the country.

However, grassroots democracy faces persistent structural constraints characterized as the '3Fs'—Lack of Funds, Functions, and Functionaries. Many state governments remain reluctant to meaningfully devolve financial powers and administrative autonomy to local bodies. Consequently, PRIs often function merely as implementation agencies for central and state schemes rather than vibrant, autonomous institutions of local self-government.

2. Gender Empowerment and Political Representation:

One of the most transformative outcomes of local political decentralization has been the constitutional reservation of 33% (and up to 50% in several states) of seats for women in local bodies. Millions of women have stepped into public leadership, reshaping rural priorities toward sanitation, education, healthcare, and water supply. Building upon this success, the passage of the Constitution (One Hundred and Sixth Amendment) Act, 2023—popularly known as the Nari Shakti Vandan Adhiniyam—mandates 33% reservation for women in the Lok Sabha and State Legislative Assemblies. This landmark structural reform promises to correct historical gender disparities in higher political leadership, fostering a more inclusive legislative domain.

Challenges To Democratic Ethos: Citizenship, Media, And Civil Society:

1. The Role of Media and Combatting Information Disorder:

A free, independent, and critical media is widely regarded as the fourth pillar of democracy. It informs the public, scrutinizes state power, and facilitates informed political deliberation. In the contemporary digital era, media landscapes have undergone radical shifts. While social media platforms democratize content creation and enable grassroots reporting, they also accelerate the spread of misinformation, deepfakes, hate speech, and algorithmic polarization.

Commercialization and sensationalism in broadcast journalism have led to diminished analytical depth, often replacing constructive governance discussions with divisive rhetoric. Preserving journalistic ethics, promoting digital media literacy, and supporting independent public interest journalism are vital for safeguarding a healthy public sphere.

2. Civil Society Mobilization and Democratic Engagement:

Civil society organizations, non-governmental groups, trade unions, and social movements play an indispensable role in maintaining state accountability and giving voice to marginalized communities. From the Right to Information (RTI) movement to environmental rights activism, civil society has historically pushed the boundaries of democratic governance. Contemporary governance must ensure a balanced approach that maintains statutory compliance while preserving a vibrant, enabling environment for peaceful civic action and policy advocacy.

Strategic Recommendations and Policy Pathways:

To address these multifaceted challenges and bolster democratic institutions in India, a comprehensive policy roadmap is essential. Key strategic recommendations include:

- **Electoral Finance Reform:** Establish a State Election Fund or introduce partial public funding alongside strict real-time audit mechanisms to regulate campaign expenditure and remove dark money from elections.
- **Institutional Independence:** Strengthen the appointment frameworks for constitutional bodies, including the ECI and central investigative agencies, through multi-partisan selection committees.
- **Reinforcing Federal Harmony:** Operationalize the Inter-State Council as a vibrant platform for executive consensus and strictly adhere to Sarkaria Commission guidelines regarding Gubernatorial appointments.
- **Bridging the Digital Divide:** Standardize offline administrative fallback mechanisms for essential civic services to ensure that technology serves as an enabler rather than an exclusionary barrier.

- **Empowering Grassroots Governance:** Devolve administrative and financial autonomy directly to PRIs and ULBs, ensuring state finance commissions' recommendations are implemented in a timely manner.
- **Judicial Modernization:** Expand judicial infrastructure, double the judicial capacity in district courts, and leverage AI responsibly for administrative case management to reduce pending backlogs.

Conclusion:

Indian democracy is a dynamic, continuously evolving constitutional journey. As the nation navigates complex 21st-century realities—ranging from digital transformations to structural federal shifts—the foundational principles of institutional integrity, rule of law, and inclusive governance remain its ultimate anchors. The strength of Indian democracy lies in its ability to adapt, reform, and self-correct.

Addressing contemporary governance issues requires a renewed commitment to constitutionalism from all political actors, administrators, judicial officers, and citizens. By safeguarding electoral transparency, deepening fiscal federalism, humanizing digital public systems, and empowering local communities, India can fortify its democratic institutions. As Dr. B.R. Ambedkar famously remarked, 'Democracy is not merely a form of government; it is primarily a mode of associated living, of conjoint communicated experience.' Preserving and advancing this constitutional vision is the collective responsibility of contemporary Indian society.

References:

1. Ambedkar, B. R. (1949). Constituent Assembly Debates. Government of India.
2. Austin, G. (1999). Working a Democratic Constitution: The Indian Experience. Oxford University Press.
3. Basu, D. D. (2021). Introduction to the Constitution of India (25th ed.). LexisNexis.
4. Chhibber, P., & Verma, R. (2018). Ideology and Identity: The Changing Party Systems of India. Oxford University Press.
5. Election Commission of India. (2024). Statistical Reports and Electoral Finance Guidelines. ECI Publications.
6. Jaffrelot, C. (2021). Modi's India: Hindu Nationalism and the Rise of Ethnic Democracy. Princeton University Press.
7. Khaitan, T. (2020). Executive Aggrandizement in Established Democracies: A Case Study of India. International Journal of Constitutional Law, 18(1), 244-270.
8. Mehta, P. B. (2003). The Burden of Democracy. Penguin Books India.
9. Punchhi Commission. (2010). Report of the Commission on Centre-State Relations. Government of India.
10. Sarkaria Commission. (1988). Commission on Centre-State Relations Report. Government of India.
11. Singh, M. P., & Saxena, R. (2011). Indian Politics: Contemporary Issues and Concerns. PHI Learning.
12. Supreme Court of India. (2024). Association for Democratic Reforms & Anr. v. Union of India & Ors. (Electoral Bonds Judgment). Writ Petition (C) No. 880 of 2017.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Decline of Inner-Party Democracy and Rise of Dynastic Politics: A Crisis of Representation in Indian Democracy

Prakash S. Kamati
Research Scholar, Department of Political Science,
Kitturu Rani Channamma University, Belagavi 591156 India
Corresponding Author – Prakash S. Kamati

DOI - 10.5281/zenodo.23058821

Abstract:

Political parties are considered the backbone of a representative democracy, acting as a crucial link between the state and civil society. However, the internal functioning of political parties in India presents a paradox: while they champion democracy at the national level, most remain undemocratic internally. This research paper examines the intertwined phenomena of declining inner-party democracy (IPD) and the rise of dynastic politics in India. Using secondary data analysis, the study draws upon reports from the Election Commission of India (ECI), Association for Democratic Reforms (ADR), and qualitative studies by scholars such as Kanchan Chandra, Suhas Palshikar, and Pradeep Chhibber. The paper argues that the absence of IPD is not an accidental flaw but a structural outcome of high-command culture, centralized funding, and weak regulatory mechanisms. The findings reveal that in the 18th Lok Sabha (2024), approximately 43% of MPs have a family background in politics, and over 70% of major parties have never conducted genuine organizational elections. Dynastic politics, defined as the concentration of political power within a family, has led to limited social mobility, policy stagnation, and the transformation of parties into family enterprises. The paper analyses its impact on governance, representation of marginalized groups, and accountability. It also critically evaluates the role of the ECI, anti-defection law, and judiciary in regulating party affairs. The paper concludes with recommendations including mandatory internal elections under Section 29A of the Representation of the People Act, 1951, transparent party funding, and democratization of candidate selection processes to restore the democratic character of Indian political parties.

Keywords: Inner-Party Democracy, Dynastic Politics, Political Parties, Representation, Election Commission, Indian Democracy.

Introduction:

In his classic work, Robert Michels (1911) proposed the "Iron Law of Oligarchy," arguing that all organizations, however democratic at inception, inevitably become oligarchic. Indian political parties provide a stark validation of Michels' thesis. The Constitution of India guarantees democracy to citizens, but democracy within political parties, the vehicles that carry this democracy, remains elusive.

Inner-Party Democracy (IPD) refers to the implementation of democratic principles within the organization of a political party - regular internal elections, freedom of speech for members, democratic selection of candidates, and decentralized decision-making.

Dynastic politics is a direct consequence of the failure of IPD. When a party is controlled by a single family, internal democracy ceases to exist.

This paper seeks to answer two questions: (a) What are the structural causes for the decline of IPD in India? (b) How does dynastic politics affect the quality of Indian democracy and governance?

Conceptual Framework and Literature Review:

1. What is Inner-Party Democracy?

According to International IDEA (2017), IPD has three pillars:

1. Membership: Open and inclusive membership.
2. Organization: Regular elections for party posts from booth level to national president.
3. Decision Making: Bottom-up approach in manifesto and candidate selection.

2. What is Dynastic Politics?

Kanchan Chandra (2016) in _Democratic Dynasties_ defines dynastic politics as a political practice where power is transferred within a family. A dynast is a politician who had a family member in politics before them.

ADR classifies a party as dynastic if its top leadership is from one family for more than two generations.

Status of Inner-Party Democracy in India: Empirical Evidence:

The situation in India is alarming.

a) No Organizational Elections: Most national and regional parties have not held internal elections for decades. For example, the Indian National Congress (INC) did not hold elections for the post of President through a genuine contest from 2001 to 2022. In many regional parties like Samajwadi Party (SP), Rashtriya Janata Dal (RJD), Dravida Munnetra Kazhagam (DMK), Shiv Sena, Telugu Desam Party (TDP), and Nationalist Congress Party (NCP), the post of party president has remained within one family since inception.

A study by Association for Democratic Reforms (2023) on 8 national parties found that 5 parties had not declared any organizational election in the last 10 years to the ECI.

b) Candidate Selection: Candidate selection is done by a "High Command" or "Parliamentary Board" which is nominated, not elected. A survey by CSDS-Lokniti (2019) found that 47% of party workers felt they had no say in choosing their own constituency candidate.

c) Funding Centralization: Party funds are controlled by the top leadership. This prevents lower-level leaders from challenging the high command. The introduction of Electoral Bonds (2018-2024) further centralized funding, as 57% of bonds went to the ruling party (Election Commission data, 2024).

Rise of Dynastic Politics: Causes:

1. Historical and Social Causes:

In a society with low literacy and strong kinship ties, family name acts as a brand. As James Manor (2013) argues, in patronage-based politics, voters prefer a known family because they believe access to the state is easier through them.

2. Institutional Causes:

1. **Weak Election Commission Regulation:** Section 29A of the Representation of the People Act, 1951 requires parties to be registered, but it does not mandate internal elections. The ECI can only issue reminders, not de-register parties for lack of IPD.
2. **Anti-Defection Law (52nd Amendment, 1985):** Intended to prevent defection, it actually made MPs and MLAs slaves to party leadership. If they vote against party whip, they lose their seat. This killed dissent inside parties.
3. **No Law on Party Funding:** There is no limit on party expenditure, only on candidate expenditure. This makes parties dependent on family wealth.

3. Data on Dynastic Politics in India:

- **Lok Sabha 2024:** Out of 543 MPs, 233 (42.9%) had a family member who had been an MP, MLA or Minister before. Among MPs under 30, this figure is 71%.
- **Regional Variation:** In Uttar Pradesh, Bihar, Maharashtra, Tamil Nadu and Punjab, over 50% of MPs are dynasts.
- **Party-wise:** NCP (77% dynasts), SP (71%), DMK (65%), INC (52%), BJP (29%) - BJP has lowest but rising (ADR, 2024).

Consequences for Democracy and Governance:

1. Impact on Representation:

Dynastic politics blocks entry of meritorious but non-connected individuals. It particularly affects SC, ST, and OBC youth. While dynasts come from dominant castes or political families, a grassroots Dalit or Adivasi worker rarely reaches top leadership. This violates the principle of social justice.

2. Impact on Policy Making and Governance:

When loyalty to family replaces merit, governance suffers. Parties become high-command driven, not ideology driven. There is no internal debate. For example, economic policies or alliance decisions are taken by one family without consulting state units. This leads to poor policy outcomes.

Pradeep Chhibber and Rahul Verma (2018) in _Ideology and Identity_ argue that lack of IPD is the reason why Indian parties lack a clear ideological program and rely on personality cult.

3. Erosion of Accountability:

If a party leader knows his son will succeed him regardless of performance, he is not accountable to party workers or voters. The party becomes a private limited company. Workers become employees, not stakeholders.

4. Normalization of Nepotism:

Dynastic politics in politics legitimizes nepotism in other institutions - bureaucracy, judiciary, business, and cinema, creating a closed elite system.

Case Studies:

Case 1: Congress Party: Classic example of high-command culture. From Jawaharlal Nehru to Indira Gandhi to Rajiv Gandhi to Sonia Gandhi to Rahul Gandhi - leadership remained within one family for 5 generations. Though internal elections were held in 2022, the Gandhi family still retains veto power.

Case 2: Regional Parties as Family Firms: SP (Mulayam Singh Yadav family - 12 members in politics), DMK (Karunanidhi family), RJD (Lalu Prasad family), Shiv Sena (Thackeray family), TDP (NTR family). In these parties, succession is hereditary, not democratic.

Case 3: Exception - Left and Cadre Parties: CPI(M) and to some extent BJP have better internal processes. BJP conducts organizational elections every 3 years from booth level, though its parliamentary leadership remains centralized. CPI(M) has Politburo elected by party congress, and family politics is less common.

Role of Election Commission and Judiciary:

The ECI has repeatedly recommended reforms:

- In 1996, ECI recommended mandatory internal elections and de-registration of parties that fail to hold them. Law Ministry rejected it.
- In its 2016 guidelines, ECI asked parties to submit audited accounts and internal election records, but compliance is formal, not substantive.

The Supreme Court in _Indian National Congress vs Institute of Social Welfare (2002) ruled that ECI cannot de-register a party under 29A except in extreme cases of fraud. This limited ECI's power.

Law Commission 170th Report (1999) and 255th Report (2015) both strongly recommended IPD laws, but no government implemented them because all parties benefit from status quo.

Way Forward and Recommendations:

To revive IPD, structural reforms are needed:

1. **Legal Reform:** Amend Section 29A to make internal elections mandatory every 5 years. Parties failing to comply should lose their reserved symbol and tax benefits.
2. **Transparent Candidate Selection:** At least 30% of candidates should be selected through secret ballot by party

workers at constituency level, as practiced in the UK Labour Party's primaries.

3. **Regulate Party Funding:** State funding of political parties linked to internal democracy performance. Ban cash donations above Rs. 2000 and make all donations public.
4. **Strengthen Anti-Defection Law:** Allow free vote except on no-confidence motions and finance bills, to encourage dissent.
5. **Youth and Women Quota within Parties:** Internal reservation for women and grassroots workers in party posts.
6. **Digital Membership:** Use technology to make party membership open and verifiable, preventing bogus membership.

Conclusion:

Dynastic politics is not just a moral issue; it is a governance issue. It turns political parties from institutions of democracy into instruments of inheritance. As Dr. B.R. Ambedkar warned, "Bhakti in religion may be a road to salvation, but bhakti in politics is a sure road to degradation."

The decline of inner-party democracy explains why India, despite being an electoral democracy, struggles to become a substantive democracy with accountability and equal opportunity. The solution lies not in blaming families but in creating a legal and institutional framework that makes it difficult for oligarchy to survive.

Until political parties democratize themselves, Indian democracy will remain democratic on the outside but oligarchic on the inside. Reforming political parties is the next great democratic challenge for India.

References:

1. Association for Democratic Reforms. (2024). *Analysis of family background of MPs in 18th Lok Sabha*. New Delhi, India: Association for Democratic Reforms.
2. Chandra, K. (2016). *Democratic dynasties: State, party, and family in contemporary Indian politics*. Cambridge University Press.
3. Chhibber, P. K., & Verma, R. (2018). *Ideology and identity: The changing party systems of India*. Oxford University Press.
4. Election Commission of India. (2024). *Report on electoral bonds data*. Election Commission of India
5. International Institute for Democracy and Electoral Assistance. (2017). *The state of democracy in the world*.
6. Law Commission of India. (1999). *170th report on reform of electoral laws*. Government of India.
7. Law Commission of India. (2015). *255th report on electoral reforms*. Government of India.
8. Manor, J. (2013). The role of political families in India. *Seminar, 646*, 14–19.
9. Michels, R. (1911). *Political parties: A sociological study of the oligarchical tendencies of modern democracy*. Hearst's International Library.
10. Palshikar, S., & Suri, K. C. (2014). India's 2014 Lok Sabha elections: Critical shifts. *Economic and Political Weekly, 49*(39), 39–42.
11. Vaishnav, M. (2017). *When crime pays: Money and muscle in Indian politics*. Yale University Press.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Challenges Facing Women Candidates in Local Governance and Elections: A Study of Political Participation, Representation and Empowerment

Dr. Geeta Mallapur
Department of Political Science,
K L E's S V S Bellubbi Arts and Commerce College, Savadatti, Karnataka State
Corresponding Author – Dr. Geeta Mallapur
DOI - 10.5281/zenodo.23058837

Abstract:

Women's participation in local governance is an important measure of democratic inclusion. Constitutional reservations have increased the number of women entering Panchayats and other local institutions. Article 243D of the Indian Constitution provides for not less than one-third reservation for women in directly elected Panchayat seats and in the offices of Panchayat chairpersons. According to recent Ministry of Panchayati Raj information, women constitute approximately 49.75% of elected representatives in Panchayati Raj Institutions.

However, numerical representation does not always guarantee effective political power. Women candidates and elected representatives continue to face patriarchal attitudes, lack of financial resources, family responsibilities, political-party discrimination, inadequate training, administrative barriers, political violence and proxy representation. This article examines these challenges and argues that women's empowerment requires a shift from formal representation to substantive participation and independent decision-making. It also suggests measures relating to training, institutional support, political-party reform, protection from violence and the prevention of proxy leadership.

Keywords: Women Candidates, Local Governance, Elections, Political Participation, Representation, Empowerment, Panchayati Raj, Proxy Politics.

Introduction:

Women's participation in local governance is a vital measure of democratic inclusion because local institutions are closest to citizens and directly address everyday concerns such as drinking water, sanitation, education, healthcare, roads, housing and welfare services. When women participate in these institutions, issues affecting women, children and marginalized communities are more likely to enter public discussion and influence development priorities. In India, the 73rd and 74th Constitutional Amendments created an important institutional foundation for women's political participation, while Article 243D provides for not less than one-third reservation for women in directly elected Panchayat seats and in the offices of chairpersons. These provisions have opened local political institutions to millions of women and have challenged the traditional male dominance of public decision-making. At the same time, the existence of reservation does not automatically guarantee independent authority. Women may be formally elected yet continue to face patriarchal attitudes, financial dependence, limited political experience, unpaid care responsibilities, intimidation, administrative discrimination and interference from male relatives. This creates a crucial distinction between **representation** and **empowerment**: representation refers to women occupying elected positions, whereas empowerment refers to their ability to speak, make decisions, control resources and influence public policy independently. Against this background, the present article examines the challenges facing women candidates in local

governance and elections and analyses whether women's entry into political institutions has resulted in substantive participation, effective representation and genuine political empowerment. Comparative research also shows that legislated gender quotas generally increase women's representation in local government, although numerical gains must be supported by institutional and social reforms to produce meaningful equality.

Objectives of the Study:

1. To examine the major challenges faced by women candidates in local elections.
2. To study the influence of family, political parties and local power structures.
3. To examine the problem of proxy representation.
4. To understand the importance of education, training and financial independence.
5. To suggest measures for strengthening women's independent participation in local governance.

Methodology:

This article uses a qualitative and analytical approach based on secondary sources, including the Constitution of India, government reports, Ministry of Panchayati Raj publications, parliamentary documents, academic studies and UN Women reports. The data is analysed thematically under areas such as patriarchy, financial dependence, unpaid care work, lack of training, proxy representation, political-party barriers, administrative discrimination and political violence. This method helps distinguish between formal representation, or occupying an elected position, and substantive participation, or exercising genuine decision-making power.

Constitutional and Institutional Framework:

1. Reservation in Panchayati Raj:

Institutions Article 243D of the Indian Constitution provides for at least one-third reservation for women in directly elected Panchayat seats and in the offices of chairpersons. This provision aims to address the historical exclusion of women from political decision-making. Reservation has increased the number of women entering politics, created opportunities for first-time leaders, provided political experience to rural women, encouraged participation in public meetings, produced role models for younger women and brought women's concerns into local development discussions. However, reservation mainly creates an opportunity for political entry; it does not automatically guarantee independent decision-making, administrative knowledge or control over public resources.

2. Responsibilities of Panchayat Officials:

Panchayat officials and secretaries have a responsibility to communicate directly with elected women representatives and must not allow husbands, fathers or other relatives to perform their official duties on their behalf. An elected woman is the lawful representative, not her male relative. This principle is essential for preventing proxy representation and ensuring that women can exercise the authority given to them by the Constitution. Direct communication, proper training and institutional support can help women representatives perform their responsibilities independently.

Major Challenges Facing Women Candidates:

1. Patriarchal Attitudes:

Patriarchal attitudes remain one of the most significant barriers to women's political participation. In many communities, politics is still considered a male-dominated field, while women are expected to remain primarily within the household. Women candidates may be told that politics is unsuitable for women, that they should focus on family responsibilities, or that men are

better suited for leadership. They may also be discouraged from dealing with government officials, political opponents or public institutions because their political involvement is believed to affect family reputation. Such attitudes can prevent women from contesting elections and reduce their confidence after being elected. Women are also frequently judged by their appearance, character, family life and personal behaviour rather than by their political programmes, leadership abilities and public service.

2. Lack of Financial Resources:

Financial resources are essential for contesting elections because candidates need money for travel, public meetings, campaign materials, communication, election agents and voter outreach. Women often have less access to independent income, property, business networks and political funding. This financial inequality creates two major difficulties. First, capable women may be unable to contest elections because they cannot meet campaign expenses. Second, women who depend on male relatives, wealthy supporters or powerful political actors may become politically dependent on them after election. Such dependence can restrict their ability to make independent decisions. UN Women identifies limited access to campaign funds, inadequate media visibility and unequal access to party resources as continuing barriers to women's entry into and advancement in political office.

3. Unpaid Care Work:

Women generally carry a greater share of unpaid domestic and care responsibilities, including childcare, cooking, cleaning, household management and caring for elderly or sick family members. Political participation, however, requires considerable time for campaigning, attending meetings, visiting government offices, meeting citizens, travelling to administrative centres, studying official documents and participating in training programmes. Because of these competing responsibilities, many women cannot devote sufficient time to political activities. Their political careers may be interrupted or weakened by family expectations and a lack of support at home. UN Women identifies unequal care responsibilities and time constraints as important barriers to women's political participation.

4. Lack of Education and Training:

Many women representatives are first-time participants in formal politics and may have limited knowledge of Panchayat procedures, local-government laws, budget preparation, government schemes, public finance, administrative communication, meeting rules and the rights and responsibilities associated with elected office. When women do not receive adequate training, they may depend on male relatives, Panchayat secretaries or local political intermediaries to understand official processes and make decisions. This dependence can reduce their confidence and weaken their authority. Therefore, training programmes should be regular, practical, accessible and conducted in local languages. They should include instruction in budgeting, public administration, legal rights, government schemes, public speaking and decision-making.

5. Proxy Representation:

Proxy representation is one of the most serious challenges facing women in local governance. It occurs when a woman is legally elected to office but a male relative, usually her husband or another family member, exercises political power on her behalf. In such situations, the male relative may attend official meetings, communicate with government officials, control budgets and development projects, or make decisions without the woman's independent participation. Sometimes women may be asked to sign official documents without fully understanding their contents. This practice weakens women's political autonomy and allows existing male power structures to continue under the appearance of gender inclusion. A recent study of local politicians in two Indian states reported a significant gender gap in direct responses to researchers, suggesting differences in the extent to which women politicians participate personally rather than through proxies.

6. Political-Party Discrimination:

Political parties play an important role in selecting candidates, providing campaign support and creating opportunities for political advancement. However, women may receive fewer election tickets, less financial assistance, weaker organizational support and fewer opportunities in winnable constituencies. They may also be excluded from important party committees and denied leadership responsibilities. Although many parties have women's wings, these wings may have limited influence over major policy and candidate-selection decisions. If political parties do not reform their internal structures, constitutional reservation alone may not produce a continuous pipeline of women political leaders. Genuine equality requires parties to provide women with equal access to nominations, campaign resources, leadership positions and decision-making bodies.

7. Violence and Intimidation:

Women candidates may face physical, verbal, sexual, psychological and online violence during and after elections. Threats may be directed at the candidates themselves or at their family members. Political violence can include threats during campaigns, physical attacks, sexual harassment, character assassination, online abuse, pressure to withdraw a candidature and retaliation for opposing powerful local groups. Such violence discourages women from contesting elections and may force elected women to avoid taking independent political positions. The fear of violence can also limit their mobility, public speaking and interaction with voters. Effective protection mechanisms, prompt investigations and strict action against political intimidation are necessary to ensure that women can participate safely in democratic institutions.

8. Administrative Barriers:

Women representatives may not receive equal cooperation from government officials, political actors or other members of local institutions. They may be ignored during meetings, excluded from informal discussions, denied access to official files, prevented from inspecting development work or treated merely as symbolic representatives. In some cases, officials may communicate primarily with male relatives instead of the elected woman. Women may also be excluded from budget-related decisions or directed by male intermediaries. Administrative discrimination is particularly harmful because a woman may formally hold public office but lack access to the information and institutional resources required to perform her duties. Direct communication between officials and elected women, along with transparent administrative procedures, is essential for strengthening their authority.

9. Social Mobility Restrictions:

Some women face restrictions on travelling, speaking publicly or interacting with men outside their families. These social and cultural restrictions can make it difficult for them to campaign, attend meetings, visit government offices or build political networks. Limited mobility may prevent women from meeting voters, monitoring public works, participating in training programmes and communicating directly with administrative officials. In rural areas, lack of safe transport and social pressure can further restrict women's movement. As a result, women may hold elected positions but remain unable to perform their public responsibilities effectively.

10. Intersectional Discrimination:

Women's political experiences differ according to caste, class, religion, disability, age and geographical location. A poor rural woman from a Scheduled Caste or tribal community may face several forms of discrimination simultaneously. She may have less access to education, finance, political networks, transportation and administrative support than an economically privileged woman. Women with disabilities may face inaccessible meeting places, while minority women may experience both gender and community-based discrimination. Therefore, research on women's political representation must examine not only how

many women are represented but also which women are represented and whether they possess equal authority and decision-making power. An inclusive approach should ensure that political empowerment reaches women from all social backgrounds.

Representation and Empowerment:

Representation and empowerment are closely connected, but they are not identical. Representation refers to the presence of women in political institutions, while empowerment refers to their ability to exercise authority and influence decisions. A woman may be nominated as a candidate, win an election, occupy a reserved seat, become a chairperson or appear in official records as an elected representative. These conditions indicate formal representation, but they do not necessarily prove that she has political power.

Effective representation exists when a woman personally attends meetings, speaks freely, makes independent decisions and participates in budgetary matters. It also involves communicating directly with government officials, responding to citizens, leading development programmes and having the freedom to disagree with family members, political intermediaries and local elites. Therefore, effective representation requires more than occupying a position; it requires the ability to perform the responsibilities associated with that position.

Empowerment is a broader process through which women gain the knowledge, confidence, resources and authority necessary to act independently. It includes political awareness, economic independence, public authority, access to information, negotiation skills, institutional recognition and freedom from intimidation. An empowered woman representative can understand government procedures, question officials, participate in policy decisions, manage public resources and express her own political opinions.

The main research problem is therefore the gap between **being represented and having power**. A woman may hold office formally while her decisions are controlled by male relatives or local political actors. Conversely, a woman who receives family assistance during the early stages of her political career may gradually develop independent leadership through training, experience and public support. For this reason, research should examine not only the number of women elected but also their meeting attendance, speaking participation, decision-making authority, access to information and control over development programmes.

Positive Effects of Women's Participation:

Despite the challenges, women's participation in local governance has produced several important positive effects. The entry of women into local political institutions has increased their visibility as public leaders and challenged the traditional belief that political authority belongs exclusively to men. Women's presence in Panchayats and municipalities demonstrates that leadership is not limited by gender and encourages communities to recognize women as decision-makers.

Women representatives may also bring greater attention to social welfare issues. Their political priorities often include drinking water, sanitation, healthcare, education, childcare, domestic violence, nutrition and public safety. These issues are closely connected with everyday life, especially for women and children, but they have frequently received inadequate attention in male-dominated political institutions.

Women leaders also create a positive role-model effect. Their participation can inspire girls and younger women to pursue education, public service and political careers. When women observe other women speaking in public meetings, managing local institutions and negotiating with government officials, their confidence in their own leadership abilities may increase.

Political office can also improve women's personal confidence and communication skills. Through participation in meetings, public

discussions and administrative processes, women may develop the ability to negotiate with officials, question local power holders and represent community interests. Such experience can transform their understanding of their own social and political capabilities.

Women representatives may further expand their political networks by developing relationships with self-help groups, civil-society organizations, government departments and other elected women. These networks can provide information, mutual support and opportunities for collective action. Local governance can therefore become a foundation for women's long-term political careers, enabling them to progress from Panchayats or municipalities to state and national politics.

Strategies for Empowerment:

1. Capacity-Building:

Continuous capacity-building is essential for converting formal representation into effective political power. Training programmes should provide women representatives with knowledge of constitutional rights, Panchayat laws, budget preparation, financial management, government schemes and administrative procedures. They should also develop practical skills such as public speaking, digital literacy, conflict management and gender-responsive planning. Training must be conducted regularly, in local languages and through accessible methods so that women from different educational backgrounds can participate effectively.

2. Direct Administrative Communication:

Government officials should communicate directly with elected women representatives rather than relying on husbands, relatives or political intermediaries. Official notices, documents, meeting information and development records should be provided personally to the elected representative. Direct communication increases accountability and enables women to understand and perform their official responsibilities. It also reduces the possibility of male relatives exercising authority unlawfully in the name of women representatives.

3. Prevention of Proxy Representation:

Proxy politics can be reduced through clear administrative and legal measures. Attendance at official meetings should be recorded personally for each elected representative. Women representatives should be required to sign and explain official documents themselves, while unauthorized relatives should not be permitted to attend formal meetings or exercise official authority on their behalf. Complaint mechanisms should be established so that women can report interference without fear. Where necessary, penalties should be imposed for unlawful interference. Legal and administrative support should also be made available to women who challenge proxy control. Public awareness programmes can further educate communities about the constitutional authority of elected women representatives.

4. Political-Party Reform:

Political parties must play a greater role in promoting women's political leadership. They should provide women with more election tickets, equal campaign funding and organizational support. Women should be selected not only for reserved constituencies but also for constituencies where the party has a realistic chance of winning. Political parties should include women in senior committees, create safe internal complaint systems and establish leadership-training programmes. Women's political careers should also be promoted beyond reserved seats so that they can continue to hold important positions in mainstream political institutions.

5. Support for Care Responsibilities:

Women's political participation is often restricted by unpaid domestic and care work. Political institutions should therefore provide childcare facilities, flexible meeting schedules, safe transport, travel allowances and accessible training venues. Family-support services can help women balance public responsibilities with household duties. Local-government meetings and training programmes should be organized at times and places that do not unnecessarily exclude women with care responsibilities.

6. Protection from Violence:

Women candidates and representatives require prompt and effective protection from threats, harassment, political intimidation, online abuse, physical violence and retaliation for making independent decisions. Complaint procedures should be simple, confidential and accessible. Law-enforcement agencies must respond quickly to threats against women candidates and their families. Online abuse and character assassination should also be treated seriously because they can damage political careers and discourage other women from entering public life.

7. Economic Support:

Women candidates should have access to transparent, lawful and equal campaign resources. Political finance systems should not favour candidates from wealthy families, business networks or established political groups. Public funding mechanisms, transparent party support and financial training can help women contest elections independently. Economic support should be accompanied by strict accountability so that campaign resources are used lawfully and fairly.

Overall, empowerment requires more than increasing the number of women in political institutions. It requires creating the social, economic and institutional conditions in which women can speak, decide, negotiate and lead independently. The goal should be to move from **symbolic representation to substantive participation and genuine political power**.

Discussion:

The participation of women in local governance has expanded significantly through constitutional reservation, but numerical representation does not always lead to genuine political empowerment. Women may occupy elected positions while their ability to speak, make independent decisions, control public resources and influence development policies remains restricted by social, economic and institutional barriers. The central distinction is between formal representation and substantive participation: formal representation refers to the number of women who contest elections or hold reserved seats, whereas substantive participation refers to their actual involvement in meetings, policy-making, budgeting and public administration. Reservation is therefore an important first step, but it cannot by itself eliminate patriarchal control. A woman may be formally elected yet remain dependent on her husband, father or another male relative, resulting in proxy representation. Proxy leadership becomes particularly problematic when male relatives attend official meetings on behalf of elected women, communicate with officials, control public funds, influence signatures, make development decisions or prevent women from expressing their own opinions. Although family assistance may sometimes help women gain initial political experience, reservation risks reproducing male power rather than transforming it when women are denied the freedom to make final decisions.

Social norms and patriarchal expectations further discourage women from speaking publicly, travelling independently, meeting officials or opposing influential men, while the combined burden of domestic work and public responsibilities makes political participation more difficult for women than for men. Financial barriers also affect women's political autonomy because campaigns require resources for nomination procedures, travel, publicity, meetings and voter contact. International research identifies lack of campaign funding as a major barrier to women's political participation, particularly in rural and remote areas.

Women who depend on husbands, relatives or political patrons may find it difficult to oppose them after election, making gender-sensitive political financing, transparent party support and non-partisan fundraising important. Political parties are also significant gatekeepers because they determine nominations, campaign resources and leadership opportunities. Women may receive fewer tickets, less financial and organizational support, fewer positions in winnable constituencies and

limited access to important party committees. Consequently, gender equality in elected institutions requires internal democracy and gender equality within political parties, not merely constitutional reservation. Education, training and institutional knowledge are equally important, since first-time women representatives may lack familiarity with budgets, government schemes, legal procedures, official communication and meeting rules. Training should be continuous, practical, available in local languages, sensitive to different educational backgrounds and supported by mentoring networks.

Administrative behaviour also determines whether women can exercise real power. When officials communicate only with male relatives, ignore women in meetings, deny them access to files or exclude them from budget discussions, women are deprived of the authority legally attached to their office. Administrative institutions should therefore communicate directly with elected women, provide official documents to them personally, record their participation, prevent unauthorized relatives from representing them and establish complaint mechanisms for discrimination. Political violence, threats, harassment, character assassination and online abuse further discourage women from contesting elections or opposing powerful groups. Such violence should be understood as an attack on democratic participation rather than as a private or family matter, and it requires quick investigation, legal assistance, protection for candidates and their families, action against online abuse and safe public meetings. Women are not a socially uniform group, and their political experiences differ according to caste, class, religion, disability, age, income and geographical location. An urban educated woman may face different challenges from a rural Dalit, Adivasi, minority, poor or disabled woman; therefore, research must examine not only how many women are represented but also which women are represented and whether disadvantaged women possess independent authority.

Despite these challenges, reservation should not be considered ineffective because it has increased women's presence in local institutions, created opportunities for first-time leaders, encouraged women's public participation, made women's concerns more visible, produced role models, expanded political networks and provided experience for future political careers. Some women who initially enter politics with family assistance may gradually develop independent leadership, so the impact of reservation should be assessed over time rather than through a simple division between independent and proxy representatives. The major policy challenge is to move women from entry to leadership by providing knowledge, confidence, control over resources, public recognition, institutional support, negotiation skills and freedom from family or political coercion. Women's empowerment should therefore be measured through meeting attendance, speaking participation, control over budgets, committee involvement and independent policy decisions rather than merely by the number of seats occupied. To strengthen women's political participation, governments and political parties should provide training and mentoring, ensure direct communication with officials, prevent proxy representation, offer childcare and safe transport, improve access to lawful campaign finance, nominate women in winnable constituencies, protect women from political and online violence, collect data on actual participation and create networks of elected women representatives. Thus, the success of women's reservation should ultimately be judged not only by how many women enter local governance, but by whether they can exercise real authority and transform formal representation into substantive political empowerment.

Findings:

The study identifies the following major findings:

1. Constitutional reservation has significantly increased women's numerical representation in local governance.
2. Women continue to face patriarchal attitudes that question their leadership abilities.
3. Financial dependence limits women's ability to contest elections independently.
4. Unpaid domestic and care work restricts women's time for politics.
5. Inadequate training increases dependence on family members and officials.
6. Proxy representation remains a serious challenge in some local institutions.
7. Political parties may provide limited support and leadership opportunities.
8. Women candidates may face threats, harassment and character assassination.
9. Administrative discrimination can reduce women's influence after election.
10. Women's experiences differ according to caste, class, education, location and economic status.
11. Numerical representation becomes genuine empowerment only when women exercise independent authority.
12. Institutional support and continuous capacity-building are essential for effective participation.

Conclusion:

Women's participation in local governance is a major achievement of Indian democracy. Constitutional reservation has enabled many women to contest elections and serve as representatives in Panchayati Raj Institutions, significantly increasing their formal political presence. However, numerical representation does not always result in genuine empowerment. Patriarchal attitudes, financial difficulties, unpaid care work, inadequate training, political-party discrimination, administrative barriers, violence and proxy representation may prevent women from speaking independently, controlling resources and influencing development decisions.

Representation means holding an elected position, while empowerment means having the knowledge, confidence, resources and authority to make independent decisions. Therefore, reservation must be supported by continuous training, financial assistance, action against proxy politics, protection from violence, internal party democracy, direct communication with officials, childcare and mobility support, and inclusion of marginalized women. The future of local democracy depends not only on increasing the number of women in office but also on ensuring that they exercise real leadership. The ultimate goal should be to move from **symbolic representation to substantive power** and from **formal participation to genuine political empowerment**.

References:

1. Constitution of India, Article 243D.
2. Ministry of Panchayati Raj, Government of India, official information on women elected representatives.
3. Press Information Bureau, Government of India, "Representation in Panchayats."
4. UN Women, *Corporate Thematic Evaluation of UN Women's Support to Women's Political Participation*.
5. Press Information Bureau, Government of India. "Representation in Panchayats." This source discusses Article 243D and reservation for women in Panchayati Raj Institutions.
6. Parliament of India. "Status of Women Representatives in Panchayati Raj Institutions." Parliamentary question and official government response on women's representation in local governance.
7. Bauri, Asha, and Anindya Basu. "Women's Political Participation and Empowerment in Urban Local Governance in West Bengal, India." *Journal of Asian and African Studies*, 2024.
8. "Mere Proxies or Genuine Leaders? Women in Local Politics in the Context of Gender Quotas." Research study on women's autonomy, proxy representation and political empowerment in local governance.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Karnataka's Youth and Freebie Politics: A Comprehensive Study of Attitude Formation and Democratic Participation

Dr. Ravichandra Walikar[1] & Dr. Yallappa Mugalihal[2]

[1]*Assistant Professor Dept of Political Science,*

B.L.D.E.A.s New Arts College Tikota Dist: Vijayapur, Karnataka

[2]*Assistant Professor Dept of Political Science,*

G.F.G.C.Harugeri Tq: Rayabag Dist: Belagavi, Karnataka

Corresponding Author – Dr. Ravichandra Walikar

DOI - 10.5281/zenodo.23058881

Abstract:

Freebie-oriented welfare politics often described as freebism has become a powerful factor influencing electoral choices in many Indian states, including Karnataka. This study examines how young people in Karnataka understand, engage with, and respond to freebie politics, and how these attitudes shape their broader political behavior and democratic participation. As a demographic that is both numerically significant and increasingly assertive in public discourse, the youth display layered and sometimes conflicting responses to state-sponsored welfare guarantees. For many young people from rural, semi-urban, and economically vulnerable backgrounds, government benefits such as subsidies, direct transfers, and guarantee schemes are seen as crucial supports that ease everyday hardships and expand basic opportunities. On the other hand, youth who come from relatively secure economic positions and who are more politically informed often view freebie politics critically. They question its fiscal viability and argue that an overemphasis on giveaways can divert attention from long-term developmental needs especially quality education, employability, skill enhancement, and stable job creation. Digital media plays a decisive role in shaping these attitudes. Online platforms enable rapid political messaging and counter-messaging, intensifying both support for and criticism of freebie-driven governance. As a result, youth perceptions are formed not only by personal experiences of welfare but also by the highly polarized digital political environment. The study also considers the impact of freebies on democratic participation. While welfare schemes may encourage higher voter turnout and short-term political engagement, they also risk reducing politics to transactional exchanges instead of nurturing issue-based citizenship or evaluating governance performance. Using a mixed-method approach including surveys, focused group discussions, and analysis of digital media trends the research provides a comprehensive picture of how freebie politics shapes youth expectations, political orientations, and civic behavior. It argues that meaningful and sustained democratic participation among young people requires moving beyond welfare dependency and promoting policies that build capabilities, foster dignity, and respond to their aspirations for long-term development and opportunity.

Keywords: Youth and Freebie Politics, Attitude Formation, Democratic Participation.

Introduction:

Karnataka's politics today is strongly influenced by freebie-based welfare schemes, especially as political parties use large guarantee programmes to win voter support. Among all voter groups, the youth stand out because their views and reactions play an important role in shaping democratic outcomes. However, their understanding of freebism is not the same across communities. For many young people in rural areas, from low-income families or marginalized backgrounds, these welfare schemes are seen as essential support. They help reduce financial pressure, make education or travel possible, and cover basic needs. To them, such

benefits feel like rightful entitlements that show the government is responding to their difficulties. On the other hand, many educated and urban youth view freebie politics more critically. They argue that these schemes put a heavy burden on the state's finances and are often used to influence elections. They also feel that freebies divert attention from more important long-term issues like job creation, quality education, skill development, and strengthening institutions. Digital media adds another layer. Online spaces expose young people to different political opinions, campaign messages, debates, and influencer content. This shapes their political thinking, sometimes reinforcing their beliefs and sometimes confusing them. As a result, youth attitudes are shaped by their economic background, their personal values, and the kind of information they consume online. This study looks at how freebie politics affects the political behavior and democratic participation of Karnataka's youth. It asks whether freebies truly help strengthen democratic inclusion or whether they reduce citizenship to a simple exchange of benefits. The findings also offer broader insights into governance and accountability in the state.

Aim and objectives of the Study:

The study aims to critically analyze the relationship between Karnataka's freebie politics and the political attitudes, consciousness and democratic participation of youth. It seeks to understand how welfare-oriented electoral promises influence young people's political perceptions, electoral choices, expectations from government and participation in democratic processes. The study also intends to examine whether freebie politics functions as an instrument of social welfare and political inclusion or gradually encourages dependency-oriented political behavior, while assessing its broader implications for democratic accountability, responsible citizenship and sustainable development.

Objectives of the Study:

1. To critically examine the nature, evolution and political dynamics of freebie politics in Karnataka,
2. To analyse the formation of political attitudes among Karnataka's youth in relation to freebie politics,
3. To examine the impact of freebie politics on youth democratic participation and political behavior,
4. To assess the broader democratic and developmental implications of freebie politics among Karnataka's youth

Research Methodology and Data Collection:

The present study adopts a mixed-methods research design**,** combining quantitative and qualitative approaches to provide a comprehensive understanding of the relationship between freebie politics, youth attitude formation and democratic participation in Karnataka. The study is primarily analytical and empirical in nature, and attempts to examine not merely the level of youth support for welfare-oriented electoral promises but also the social, economic, political and psychological factors that shape such attitudes. The study will cover selected districts of Karnataka representing different geographical, socio-economic and political contexts. **Primary data:** will be collected from young respondents through a structured interview schedule/questionnaire covering socio-demographic characteristics, awareness of government welfare schemes, perceptions of freebie politics, political attitudes, electoral preferences, political consciousness and different forms of democratic participation. Where appropriate, respondents will be selected through a multi-stage sampling method to ensure representation of rural and urban youth and variation in socio-economic backgrounds. In addition to the survey, qualitative information will be gathered through semi-structured interviews, focused discussions and interactions with selected youth, political activists, academics and community-level stakeholders, enabling the study to

capture the deeper meanings and experiences behind quantitative responses.

The secondary data: will be collected from Election Commission reports, Government of Karnataka publications, Union Government documents, policy reports, legislative and budget documents, political party manifestos, academic books, peer-reviewed journals, research theses, newspapers, credible digital sources and relevant institutional reports. Particular attention will be given to the development of major welfare and guarantee-oriented programmes in Karnataka and their political communication during electoral periods. Quantitative data will be systematically classified, tabulated and analyzed using percentage analysis, cross-tabulation and appropriate statistical techniques**,** while qualitative responses will be examined thematically to identify recurring patterns relating to political consciousness, welfare expectations, electoral behavior, political trust and democratic participation. The study will maintain appropriate ethical standards by ensuring informed participation, confidentiality and anonymity of respondents. By integrating empirical survey evidence with documentary and qualitative analysis, the methodology seeks to provide a balanced and evidence-based assessment of whether freebie politics among Karnataka's youth represents an expansion of welfare-based democratic inclusion or contributes to a more dependency-oriented form of electoral politics**.**

Research Questions:

1. How does freebie politics influence the political attitudes and electoral choices of Karnataka's youth?
2. How does freebie politics affect youth participation in democratic and political activities?

Discussion:

1. The influence of freebie politics on the political attitudes and electoral choices of Karnataka's youth: Freebie politics has emerged as a significant dimension of contemporary electoral politics in Karnataka, particularly through welfare guarantees, subsidies and benefit-oriented political promises. As a politically important section of the electorate, youth are increasingly exposed to such promises through elections, political campaigns, social media and public discourse. These welfare-oriented measures can influence young people's perceptions of government responsibility, political parties, development and social justice**,** thereby shaping their political attitudes. At the same time, the immediate benefits offered through electoral promises may affect voting preferences and the manner in which young voters evaluate political leadership and public policies. Therefore, examining the influence of freebie politics on Karnataka's youth is essential for understanding the changing nature of political consciousness, electoral choice and democratic participation in the state.

2. Formation of Youth Political Attitudes towards Freebie Politics: Freebie politics has become an important feature of contemporary electoral politics in Karnataka, particularly through welfare guarantees, subsidies, financial assistance and other benefit-oriented programmes. Young people constitute a significant segment of the electorate, and their political attitudes are shaped by their socio-economic circumstances, education, employment opportunities, political awareness and exposure to political communication. Their perception of freebie politics may therefore range from viewing welfare schemes as an expression of social justice and government responsibility to considering them as electoral inducements. The study examines how young people understand the distinction between **legitimate welfare measures and politically motivated freebies**, and how these perceptions influence their broader attitudes towards political parties and government.

3. Socio-Economic Factors and Political Preferences of Youth: Youth attitudes towards freebie politics cannot be understood independently of their socio-economic conditions. Factors such as **income, employment, education, rural–urban**

background, family circumstances and economic vulnerability may influence the extent to which young voters support welfare-oriented political promises. For economically disadvantaged youth, government guarantees may represent social security, economic relief and opportunities for improved living conditions. At the same time, educated and politically aware youth may evaluate such promises in relation to employment generation, development, fiscal responsibility and long-term public welfare. The study therefore analyses how differences in socio-economic background contribute to variations in political attitudes and party preferences among Karnataka's youth.

4. Freebie Politics and Electoral Decision-Making: Freebie politics may have a direct or indirect influence on the electoral choices of young voters. During elections, political parties increasingly communicate welfare promises through manifestos, public meetings, mass media and social media platforms. Such communication can shape voters' expectations and influence their evaluation of competing political parties. The study examines whether youth make electoral decisions primarily on the basis of immediate material benefits or whether they simultaneously consider **leadership, governance, employment, development, social justice, political ideology and public accountability**. It also seeks to understand whether awareness of welfare schemes translates into party support, voting preferences or changes in political loyalty.

5. Freebie Politics, Political Consciousness and Democratic Choices: The influence of freebie politics extends beyond individual voting decisions to the broader question of democratic citizenship. Political participation becomes meaningful when citizens are able to critically evaluate government policies and hold political parties accountable for their promises. The study therefore explores whether freebie politics encourages greater political awareness and participation among youth by connecting them with government programmes, or whether it promotes a **benefit-centred approach to politics** in which electoral choices are increasingly influenced by immediate personal or family gains. The central analytical concern is to determine whether welfare-oriented politics contributes to **political inclusion, social justice and democratic empowerment**, or whether excessive dependence on electoral benefits may weaken long-term political consciousness, policy-oriented voting and democratic accountability among Karnataka's youth.

6. The impact of freebie politics on youth participation in democratic and political activities. Freebie politics has become an important feature of contemporary electoral politics, particularly through welfare guarantees, subsidies, financial assistance and other benefit-oriented schemes. As a significant section of the electorate, youth are directly exposed to these political promises through election campaigns, social media, political meetings and public discussions. Such measures can increase young people's interest in political programmes by creating a direct connection between government policies and their everyday socio-economic concerns. At the same time, the nature of this engagement depends on whether youth participate as informed citizens or primarily as beneficiaries of electoral promises.

7. Influence on Voting and Electoral Participation: Freebie-oriented promises can influence the voting behavior and electoral participation of young people. Welfare schemes may encourage youth to follow political developments, compare party manifestos and participate more actively in elections. For economically vulnerable sections, such programmes may become an important consideration in determining electoral preferences. However, excessive emphasis on immediate benefits may also encourage short-term or benefit-based voting rather than evaluation of broader issues such as governance, employment, development, social justice and political accountability. The study therefore examines whether freebie politics strengthens informed electoral participation or

narrows political choice to immediate material considerations.

8. Freebie Politics and Democratic Consciousness: Youth participation in democracy extends beyond voting and includes political discussion, awareness of public policies, engagement with political parties, participation in campaigns, civic activities and questioning government performance. Freebie politics can potentially enhance democratic consciousness when welfare schemes encourage young citizens to understand government responsibilities and demand effective implementation. Conversely, when political participation becomes primarily dependent on the expectation of personal or family benefits, it may weaken critical political thinking and reduce citizens' willingness to evaluate long-term public policies. Therefore, the relationship between welfare expectations and democratic consciousness requires careful analytical examination. The impact of freebie politics on youth participation is neither entirely positive nor entirely negative; it depends upon the **nature of welfare policies, political awareness and the quality of democratic engagement**. Welfare programmes can promote social inclusion and encourage politically marginalized youth to participate in democratic processes, while excessive dependence on electoral benefits may encourage passive or transactional forms of political participation. The crucial challenge is therefore to balance **social welfare with political accountability, economic sustainability and responsible citizenship**. Meaningful youth participation should ultimately move beyond the expectation of immediate benefits towards informed voting, active civic engagement, critical political awareness and participation in the broader process of democratic governance.

Conclusion:

Freebie politics has become an important factor influencing the relationship between political parties, government and youth in Karnataka. For economically vulnerable young people, welfare guarantees can provide meaningful social support and encourage greater awareness of government policies and electoral processes. However, when political choices are driven mainly by immediate benefits, broader concerns such as employment, education, development, social justice, good governance and accountability may receive less attention. The study emphasizes that Karnataka's youth should be viewed not merely as beneficiaries of welfare schemes but as active and informed democratic citizens capable of critically evaluating political promises and government performance. Political education, civic awareness and informed electoral participation can help young voters distinguish between sustainable welfare measures and short-term electoral inducements. Ultimately, welfare politics can strengthen democracy when it promotes social inclusion and empowerment**,** but excessive dependence on electoral benefits may encourage transactional political behavior. The need of the hour is therefore to promote empowerment-oriented and sustainable welfare politics**,** enabling Karnataka's youth to participate actively in democratic processes and demand accountable governance, employment, social justice and long-term development.

References:

1. Election Commission of India. *Statistical Reports of General Elections to the Legislative Assembly of Karnataka*. Election Commission of India, New Delhi.
2. Government of Karnataka. *Karnataka Budget 2024–25*. Finance Department, Government of Karnataka, Bangalore, 2024.
3. Government of Karnataka. *Karnataka Budget 2025–26*. Finance Department, Government of Karnataka, Bangalore, 2025.
4. Government of Karnataka. *Socio-Economic Survey of Karnataka*. Planning, Programme Monitoring and Statistics Department, Bangalore.

5. Government of India. *Economic Survey 2024–25*. Ministry of Finance, Government of India, New Delhi, 2025.
6. Government of India. *Youth in India*. Ministry of Statistics and Programme Implementation, Government of India, New Delhi.
7. Chandra, Kanchan. *Why Ethnic Parties Succeed: Patronage and Ethnic Head Counts in India*. Cambridge UP, 2004.
8. Chhibber, Pradeep K., and Rahul Verma. *Ideology and Identity: The Changing Party Systems of India*. Oxford UP, 2018.
9. Pai, Sudha. *Handbook of Politics in Indian States: Regions, Parties, and Economic Reforms*. Oxford UP, 2013.
10. Yadav, Yogendra. "Understanding the Second Democratic Upsurge: Trends of Bahujan Participation in Electoral Politics in the 1990s." *Transforming India: Social and Political Dynamics of Democracy*, edited by Francine R. Frankel et al., Oxford UP, 2000, pp. 120–145.
11. Norris, Pippa. *Democratic Deficit: Critical Citizens Revisited*. Cambridge UP, 2011.
12. Dalton, Russell J. *Citizen Politics: Public Opinion and Political Parties in Advanced Industrial Democracies*. 6th ed., CQ Press, 2014.
13. Verba, Sidney, Kay Lehman Schlozman, and Henry E. Brady. *Voice and Equality: Civic Voluntarism in American Politics*. Harvard UP, 1995.
14. Sen, Amartya. *Development as Freedom*. Oxford UP, 1999.
15. Drèze, Jean, and Amartya Sen. *An Uncertain Glory: India and Its Contradictions*. Princeton UP, 2013.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Women's Representation in Local Governance in Karnataka

Priyanka Kolakar[1] & Dr Shrikant Muchandi[2]

[1]*Assistant Professor, Department of Political Science,*

S.J.M.V.B.A.J.A.S.S Arts and Commerce College for Women, Ranebennur Karnataka.

[2]*Teaching Assistant in Department of Political Science,*

Smt. Lalitadevi Gurusiddappa Sindur Government First Grade College, Savanur.

Corresponding Author – Priyanka Kolakar

DOI - 10.5281/zenodo.23058898

Abstract:

A key component of democratic decentralization, social justice, and inclusive development is the presence of women in local government. Women's involvement in Panchayati Raj Institutions (PRIs) in Karnataka has changed dramatically as a result of affirmative action policies, state laws, and constitutional amendments. A constitutional foundation for Panchayati Raj institutions was established by the 73rd Constitutional Amendment Act of 1992, which also guaranteed women at least one-third of the seats and chairperson posts. Subsequently, Karnataka passed state legislation increasing women's reservation in PRIs to 50 percent.

This study looks at women's involvement, political empowerment, and difficulties in Karnataka's municipal government. It focuses on how women transition from being recipients of development initiatives to becoming elected officials and local decision-makers. Women delegates take part in debates about drinking water, sanitation, education, health, roads, welfare programs, livelihoods, and community development at Gram Panchayats, Taluk Panchayats, and Zilla Panchayats. Research on Karnataka indicates that reservation has significantly expanded women's access to grassroots politics. However, there are still barriers related to patriarchy, caste, family duties, scarce resources, political power, and insufficient institutional support.

The paper makes the case that while numerical representation is a crucial starting point, it does not provide significant political empowerment on its own. For women representatives to be effectively empowered, they must be knowledgeable, self-assured, capable of making decisions, financially independent, and given substantial opportunities to participate in Panchayat and Gram Sabha procedures. Research on elected female representatives has shown advances in self-esteem, confidence, and decision-making, but it has also shown persistent obstacles to autonomous involvement.

Keywords: Women's Representation, Local Governance, Women's Empowerment.

Introduction:

Democracy has real meaning only when citizens have opportunities to participate in decision-making processes at the level closest to their daily lives. This is achieved through the principle of local self-government, which brings public administration and democratic participation closer to the people. In India, the 73rd and 74th Constitutional Amendments granted constitutional status to local self-government and strengthened the institutional base of Panchayats and municipalities. The 73rd Amendment added Part IX of the Constitution relating to Panchayats and provided a framework for democratic decentralization at the rural level. Women's participation is especially important, since women make up about half the population but have historically faced barriers to political participation. Social norms, unequal access to education and resources, household duties, and traditional political structures have often limited their presence in formal politics. Reservation in local government has therefore been used as an

instrument to increase women's political representation and create opportunities for leadership at the grassroots.

In the history of women's involvement in local government, Karnataka holds a significant position. Karnataka previously experimented with reservations for women in local institutions before the constitutional revisions. According to research, Karnataka's early reservation policies were a significant forerunner of the country's constitutional structure. Women's representation was codified by the Karnataka Panchayat Raj framework after the 73rd Amendment, and the state subsequently gave women a 50 percent reservation in Panchayati Raj institutions.

Beyond just numerical representation, the presence of women in elected institutions has broader consequences. It gives women the chance to learn about politics, engage with public servants, take part in development planning, and voice concerns that impact their communities. Numerous elected female members of parliament and local bodies have shown advances in confidence, self-esteem, and decision-making, according to government-sponsored studies. At the same time, representation does not automatically eliminate structural inequalities. Studies of Karnataka have highlighted the continuing influence of caste and patriarchy on women's leadership and participation. Therefore, the study of women's representation needs to consider both achievements and limitations.

This article examines the constitutional framework, historical evolution, participation, political empowerment, major challenges, and developmental role of women representatives in Karnataka's local governance.

Objectives of the Study:

1. To examine the constitutional and legal framework governing women's representation in local governance in Karnataka.
2. To analyze women's participation and political empowerment in Panchayat Raj Institutions and their contribution to grassroots democracy.
3. To identify the major challenges faced by women representatives and examine their role in local development and inclusive governance.

Constitutional and Legal Framework:

The constitutional foundation for women's representation in local governance in India is primarily associated with the 73rd Constitutional Amendment Act, 1992, which came into operation in 1993. The amendment added Part IX to the Constitution and provided constitutional status to Panchayati Raj Institutions. It established a framework for local self-government, including Gram Panchayats, intermediate Panchayats, and Zilla Panchayats, subject to constitutional and state-level arrangements. The Ministry of Panchayati Raj identifies Part IX and the Eleventh Schedule as important constitutional components of the Panchayati Raj framework.

Article 243D provides for the reservation of seats in Panchayats for Scheduled Castes and Scheduled Tribes and also specifies that not less than one-third of the total number of seats filled by direct election in every Panchayat shall be reserved for women. It also provides reservation for women among the seats reserved for SCs and STs. Reservation is similarly extended to the offices of chairpersons in Panchayats through the constitutional framework.

The 74th Constitutional Amendment Act, 1992, created a comparable constitutional framework for urban local governments, including municipalities. Together, the 73rd and 74th Amendments strengthened decentralized democratic governance in rural and urban areas. Karnataka's principal legislation is the Karnataka Gram Swaraj and Panchayat Raj Act, 1993. The Act contains provisions relating to the reservation of seats for women. Subsequent amendments increased the proportion of seats reserved for women. The current legislative framework provides for not less than 50 percent reservation for women in relevant

Panchayat seats, subject to the provisions of the Act. The Ministry of Panchayati Raj specifically lists Karnataka among the states that have provided 50 percent reservation for women in Panchayati Raj Institutions. Thus, the constitutional and legal framework has transformed women's representation from an exceptional political opportunity into an institutional feature of grassroots democracy.

Evolution of Women's Representation in Karnataka:

The evolution of women's representation in Karnataka can be understood as a gradual movement from limited participation to institutionalized political representation. Before the 73rd Constitutional Amendment, several states had experimented with reservations for women in local government, and Karnataka was one of the important early examples. Research notes that Karnataka introduced reservations for women in local bodies before the national constitutional mandate and subsequently incorporated women's reservation into its Panchayat Raj legislation. The establishment of the constitutional framework in the early 1990s marked a major turning point. The 73rd Constitutional Amendment provided a nationwide institutional basis for women's representation in Panchayats, ensuring that women would have a guaranteed minimum presence in elected local institutions rather than depending entirely upon voluntary political nomination or party decisions.

Karnataka's Panchayati Raj legislation further developed this framework. The Karnataka Gram Swaraj and Panchayat Raj Act, 1993, provided for reservations, and subsequent amendments increased women's reservation to 50 percent. The legislation also incorporates the rotation of reserved constituencies, thereby distributing reserved positions among different areas over time. This institutional change considerably expanded the number of women entering local politics. Women began serving as Gram Panchayat members, presidents, and office-bearers at different levels of the Panchayati Raj system. Their increased presence created new opportunities for women to participate in public meetings, development planning, welfare implementation, and local decision-making.

Women's Representation in Local Governance:

Women's representation has become an important feature of local governance in Karnataka. Through reservation, women occupy a substantial proportion of elected positions in Panchayati Raj Institutions. The Karnataka legal framework provides for 50 percent reservation for women, making their presence in local institutions considerably larger than it was before the introduction of affirmative measures. Representation occurs at different levels of rural local governance: at the grassroots level as members and office-bearers of Gram Panchayats, and at higher levels through participation in Taluk Panchayats and Zilla Panchayats. Their responsibilities include attending meetings, discussing local problems, participating in development planning, monitoring public services, and communicating citizens' needs to government authorities.

The significance of representation extends beyond the number of women elected. Political representation provides women with opportunities to develop leadership skills and acquire knowledge about government institutions. Research on elected women representatives in India has reported increased confidence, self-esteem, and decision-making abilities among many participants. Studies specifically examining Karnataka show that women representatives have increasingly participated in local political processes, although the extent of effective participation differs according to social and institutional circumstances. A 2026 study covering Panchayat institutions in Kolar, Dakshina Kannada, Haveri, and Yadgir examined women's access to decision-making, political and financial autonomy, accountability, and development planning.

Women representatives can also bring attention to issues that directly affect households and communities, including drinking water,

sanitation, health, education, childcare, welfare benefits, and livelihood opportunities. Research on women policymakers in Indian village councils has found that women's political representation can influence the types of local public goods receiving attention. Nevertheless, effective representation depends upon more than reservation. Women need information, training, institutional authority, financial knowledge, and the freedom to participate in deliberations. Therefore, the quality of representation is closely connected with the degree of substantive participation and decision-making power available to elected women representatives.

Political Empowerment of Women:

Political empowerment refers to the process through which individuals acquire the ability, confidence, knowledge, and institutional opportunities necessary to participate meaningfully in political decision-making. For women in local governance, empowerment involves more than simply being elected. It includes the ability to speak in meetings, influence decisions, understand government procedures, manage responsibilities, interact with officials, and represent community interests.

Reservation has created an important entry point for women into formal political institutions. Government evidence on elected women representatives has documented improvements in self-esteem, confidence, and decision-making abilities among substantial proportions of women representatives. Political participation can also transform women's relationship with the wider community. An elected woman representative gains experience in communicating with citizens, government departments, and other political actors. This can increase public visibility and provide opportunities to influence local development priorities. In Karnataka, political empowerment must also be understood in relation to social structures. Research has found that caste and patriarchal relations heavily influence women's emergence and performance as Panchayat leaders.

Training and capacity-building are therefore important components of empowerment. Newly elected representatives need knowledge of Panchayat procedures, budgets, development schemes, Gram Sabha processes, social welfare programs, and official responsibilities. Digital literacy has also become increasingly important as government services and administrative processes become more technology-based. Empowerment is strongest when women exercise actual authority rather than merely occupying reserved positions. Political empowerment should therefore be assessed through participation in decision-making, control over responsibilities, public accountability, confidence, and the ability to independently articulate community priorities. Thus, reservation provides the institutional foundation, while education, training, social support, and actual decision-making authority help convert representation into meaningful political empowerment.

Major Challenges Faced by Women:

Despite substantial progress in representation, women representatives in Karnataka continue to encounter several social, political, and institutional challenges. These challenges differ according to caste, class, education, rural conditions, political experience, and family circumstances. Patriarchal social attitudes remain a critical challenge; traditional perceptions may discourage women from speaking publicly, traveling independently for official work, or making independent political decisions. Research in Karnataka has specifically identified patriarchy as a vital factor shaping women's grassroots leadership.

Family responsibilities can also restrict participation, as women frequently carry heavy burdens regarding household management, childcare, and the care of elderly family members. Recent research on Karnataka identifies household duties as a major factor limiting women's active participation in Panchayat governance. Another challenge is limited political and administrative experience. First-time representatives may initially

have difficulty understanding government procedures, budgets, official documents, and development programs. Without adequate training, participation can become dependent upon officials or more experienced political actors.

Proxy representation is another issue frequently discussed in research on women's local governance. Some studies have examined situations in which husbands or male relatives influence or perform political functions on behalf of elected women. Research on Karnataka has specifically discussed how caste and social inequality can also affect political participation, as women belonging to disadvantaged social groups may experience multiple forms of social and political constraint.

Other challenges include limited financial resources, inadequate access to information, intense political competition, lack of institutional support, gender bias, and difficulties in balancing public responsibilities with family expectations. Therefore, increasing representation must be accompanied by capacity-building, institutional support, gender-sensitive administrative practices, and broader social awareness.

Role of Women Representatives in Local Development:

Women representatives play a vital role in connecting local communities with government institutions and development programs. Their responsibilities extend from participation in Panchayat meetings to identifying local problems, discussing development priorities, and monitoring the implementation of public programs. One primary area is basic infrastructure and public services. Women representatives raise issues concerning drinking water, sanitation, roads, drainage, street lighting, and public health. Because these services directly affect household and community life, women's participation brings crucial concerns into local planning discussions.

Women representatives also contribute significantly to education and health. They advocate for better school facilities, student attendance, sanitation, maternal and child welfare, nutrition, and access to public health services. Research on women's political representation in India has found evidence that women policymakers influence local public-goods priorities. Another important area is social welfare and inclusion, where women representatives assist citizens in accessing government schemes and bring the concerns of disadvantaged groups before local institutions, thereby strengthening communication between communities and government departments.

Women representatives also contribute to Gram Sabha participation and local planning. Government research has found that a large proportion of surveyed elected women representatives report being able to raise pertinent issues in Gram Sabha meetings. Their role is equally significant in promoting women's collective participation by encouraging women to attend local meetings, express community concerns, and become familiar with government programs. In some Karnataka contexts, women's forums and Mahila Gram Sabhas have been used effectively to strengthen women's participation in local governance.

Conclusion:

Women's representation in local governance represents one of the most significant institutional developments in India's democratic decentralization. Karnataka has played a pioneering role in this process through its early experiments with women's reservations and subsequent legal provisions establishing substantial representation for women in Panchayati Raj Institutions. While the 73rd Constitutional Amendment provided the national constitutional foundation, Karnataka's Panchayat Raj legislation strengthened women's representation through a 50 percent reservation mandate. This expansion has created opportunities for thousands of women to enter public life and participate in grassroots decision-making, leading to notable improvements in confidence, self-esteem, and decision-making capabilities among many women representatives.

However, the transition from representation to substantive empowerment remains an ongoing process. Women continue to face patriarchal attitudes, family responsibilities, caste-based inequalities, inadequate political experience, limited institutional support, and, in some contexts, proxy participation. Karnataka-specific research demonstrates that these social structures can heavily influence the quality and independence of women's political participation. The future of women's political empowerment therefore depends not only on maintaining reservations but also on strengthening the conditions under which elected women can exercise their constitutional responsibilities. Regular training, leadership development, digital literacy, financial and administrative knowledge, access to information, and effective institutional support can greatly enhance their capacity to participate independently.

Local governance provides a particularly important space for developing political leadership because representatives directly interact with citizens and address everyday public problems. Women's participation contributes to more inclusive deliberation and greater attention to community welfare, although outcomes vary across social and institutional contexts. Ultimately, the success of women's representation should be understood through both presence and participation. Reservation establishes political opportunity; true empowerment requires the ability to use that opportunity effectively. Strengthening women's substantive participation can deepen grassroots democracy, promote social inclusion, and support responsive local development in Karnataka.

Reference:

1. Ban, R., &Rao, V. (2008). Tokenism or agency? The impact of women's reservations on village democracies in South India. Economic Development and Cultural Change, 56(3), 501–530. https://doi.org/10.1086/533551
2. Billava, N., &Hanagodimath, S. V. (2026). Gender and participation in governance of Panchayat Raj Institutions in Karnataka. Journal of Politics and Governance, 16(1), 75–89.
3. Billava, N., &Nayak, N. S. (2017). Empowerment of women representatives in Panchayat Raj Institutions: A thematic review. Journal of Politics and Governance, 5(4), 5–18. https://doi.org/10.5958/2456-8023.2016.00001.2
4. Chattopadhyay, R., &Duflo, E. (2004). Women as policy makers: Evidence from a randomized policy experiment in India. Econometrica, 72(5), 1409–1443. https://doi.org/10.1111/j.1468-0262.2004.00539.x
5. Government of India, Ministry of Panchayati Raj. (2018). Introduction to Panchayati Raj.
6. Government of India, Ministry of Panchayati Raj. (2024). Participation of women in Government of Karnataka. (1993). The Karnataka Gram Swaraj and Panchayat Raj Act, 1993. Department of Rural Development and Panchayat Raj.
7. Kumar, S., &Ghosh, A. K. (2024). Elected women representatives in local rural governments in India: Assessing the impact and challenges. Observer Research Foundation.
8. Sivanna, N., &Gubbanna, G. K. (2012). Political inclusion and participation of women in local governance: A study in Karnataka. Journal of Rural Development, 31(2), 193–210.
9. Sutar, A. S. (2007). Caste and patriarchy in the emerging women's leadership in panchayats: A study from Karnataka. Sociological Bulletin, 37(2). https://doi.org/10.1177/004908570703700203

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Government Policies, Regulatory Reforms, and Public–Private Partnerships in Healthcare: Enhancing Access, Quality, and Sustainability

Smt. Rohini Patil
Assistant Professor, MES Institute of Management, Bengaluru-560010
Corresponding Author – Smt. Rohini Patil
DOI - 10.5281/zenodo.23058921

Abstract:

Healthcare systems across the world face mounting challenges due to rising costs, demographic transitions, technological advancements, and increasing public expectations. Governments alone often lack the fiscal and managerial capacity to address these challenges effectively. Public–Private Partnerships (PPPs) have therefore emerged as a strategic policy instrument in the healthcare sector, enabling collaboration between public authorities and private entities for financing, designing, delivering, and managing healthcare services. This paper examines the role of government policies and regulatory reforms in shaping healthcare PPPs. It analyses policy frameworks, regulatory mechanisms, and institutional arrangements that influence PPP outcomes, with special reference to developing economies such as India. The study highlights key challenges and proposes policy recommendations to strengthen healthcare PPPs while safeguarding public interest.

Keywords: Healthcare Policy, Public–Private Partnership, Regulatory Reforms, Health Governance, Universal Health Coverage.

Introduction:

Healthcare is a core component of social welfare and a constitutional obligation of the state in many countries. However, public healthcare systems are increasingly strained due to limited budgets, infrastructure gaps, workforce shortages, and inefficiencies. According to the World Health Organization, achieving Universal Health Coverage (UHC) requires innovative financing and governance mechanisms alongside strong public systems.

In this context, Public–Private Partnerships (PPPs) have gained prominence as policy tools that allow governments to leverage private sector efficiency, technology, and capital, while retaining public oversight. The success of healthcare PPPs depends largely on supportive government policies and robust regulatory reforms that balance commercial interests with equity, affordability, and quality of care.

Conceptual Framework: Healthcare PPPs:

Meaning and Scope of Healthcare PPPs:

Healthcare PPPs refer to long-term contractual arrangements between government agencies and private entities for the provision of healthcare infrastructure and services. These may include:

- Hospital construction and management
- Diagnostic and laboratory services
- Primary healthcare delivery
- Emergency and ambulance services
- Health insurance and financing mechanisms

Unlike conventional outsourcing, PPPs involve shared risks, responsibilities, and outcomes.

Rationale for PPPs in Healthcare:

Governments adopt PPPs in healthcare to:

- Bridge infrastructure and service delivery gaps
- Improve efficiency and innovation
- Mobilize private investment
- Enhance service quality and patient outcomes

Government Policies Shaping Healthcare PPPs:

1. Policy Objectives:

Government healthcare policies define the goals of PPPs, such as:

- Universal access to healthcare
- Reduction in out-of-pocket expenditure
- Improved quality and availability of services
- Equity in service delivery

In India, healthcare PPPs are aligned with broader policy initiatives like the National Health Mission, which emphasizes accessible and affordable healthcare.

2. Institutional and Policy Frameworks:

Effective PPP implementation requires:

- Dedicated PPP cells within health ministries
- Clear sector-specific guidelines
- Standardized contract models
- Integration with national health strategies
- Policy clarity reduces uncertainty and builds investor confidence.

Regulatory Reforms in Healthcare PPPs:

1. Legal and Contractual Framework:

Healthcare PPPs require strong legal backing to ensure:

- Contract enforceability
- Protection of patient rights
- Transparency in pricing and service standards
- Clearly defined termination and renegotiation clauses
- Regulatory reforms often focus on harmonizing health laws with PPP and procurement regulations.

2. Quality and Safety Regulation:

Healthcare PPPs operate in a sensitive sector involving human life. Regulatory oversight is therefore critical in:

- Clinical standards
- Accreditation of facilities
- Licensing of professionals
- Patient safety and grievance redressal
- Independent regulatory bodies play a crucial role in maintaining public trust.

3. Financial and Tariff Regulation:

Reforms are needed to regulate:

- User charges
- Insurance reimbursements
- Government viability gap funding

This ensures affordability without discouraging private participation.

Models of Healthcare PPPs:

1. Infrastructure-Based Models:

Private partners design, build, and maintain hospitals or medical colleges, while clinical services may remain under public control.

2. Service Delivery Models:

Private entities provide diagnostic, dialysis, radiology, or emergency services within public hospitals under regulated contracts.

3. Insurance-Based PPPs:

Government-funded health insurance schemes implemented through private insurers and hospitals expand coverage while requiring strict regulatory supervision.

Challenges in Healthcare PPPs:

1. **Equity and Access Concerns:** Profit motives may conflict with universal access, especially for marginalized populations.
2. **Regulatory Capacity Constraints:** Weak monitoring mechanisms can result in compromised quality and unethical practices.
3. **Contractual and Governance Issues:** Poorly drafted contracts, information asymmetry, and weak dispute resolution frameworks often lead to conflicts.
4. **Public Perception and Accountability:** Healthcare PPPs face skepticism if transparency and accountability mechanisms are inadequate.

Policy Recommendations:

- Strengthen Regulatory Institutions
- Independent health regulators must be empowered to monitor quality, pricing, and compliance.

- Ensure Pro-Poor Policy Design
- PPP contracts should include equity clauses ensuring access for vulnerable groups.
- Build Government Capacity
- Training officials in contract management, health economics, and regulatory oversight is essential.
- Promote Transparency and Public Accountability
- Disclosure norms, audits, and citizen feedback mechanisms should be institutionalized.
- Align PPPs with Public Health Goals
- Healthcare PPPs must support preventive care, primary health services, and long-term public health outcomes.

Conclusion:

Public–Private Partnerships in healthcare offer significant opportunities to enhance service delivery, infrastructure, and innovation. However, their effectiveness is fundamentally shaped by government policies and regulatory reforms. A well-designed policy framework, supported by strong legal and regulatory institutions, can ensure that healthcare PPPs contribute to efficiency and sustainability without compromising equity and public welfare. Governments must therefore adopt a balanced governance approach that places public interest at the center of healthcare partnerships.

References:

1. World Health Organization. (2021). Public–private partnerships for health systems strengthening.
2. OECD. (2020). Public–Private Partnerships and Public Governance.
3. Hodge, G. A., & Greve, C. (2018). The Oxford Handbook of Public-Private Partnerships.
4. Government of India. (2022). National Health Policy and PPP Guidelines.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

From Political Apathy to Political Engagement: Changing Patterns of Youth Participation in Indian Democracy

Dr. Suresh Takatarao
Assistant Professor of Political Science,
Government First Grade College Athani, Dist. Belagavi, Karnataka, India-591304
Corresponding Author – Dr. Suresh Takatarao
DOI - 10.5281/zenodo.23058940

Abstract:

Indian democracy is often described as a democracy of the young, yet young Indians are frequently portrayed as detached from politics. This paper examines whether that portrayal remains accurate or whether it confuses declining attachment to political parties with a broader decline in political participation. Drawing on a qualitative synthesis of Election Commission of India data, Lokniti-CSDS Surveys, official demographic statistics, and scholarship on political participation in India and other democracies, the paper develops a five-part typology of youth participation that is broadly stable rather than collapsing or surging.In 2024, approximately 65% of 18- to 25-year-olds reported voting, slightly below the rate for older age groups, while fewer than 40% of eligible 18- and 19-year-olds were enrolled on the electoral rolls before the election. At the same time, issues-based mobilisation around employment, recruitment, citizenship and campus freedoms, together with digital political expression, has expanded the forms through which young people engage. Party affiliation and organizational membership, however, remain comparatively weak; the paper argues that Indian youth are moving from a predominantly partisan and institution-centred model toward a hybrid, issue-centred, and digitally mediated repertoire of participation. This shift is uneven across class,gender,region, and education, and is shaped by economic precarity, administrative barriers, unequal resources, and the uncertain conversion of voice into political influence. The paper concludes with implications for voter enrolment, civic education, Campus democracy, and the institutional representation of youth claims.

Keywords: Youth Participation, Political Engagement, Digital Activism, Indian Democracy.

Introduction:

With Persons aged 15 to 29 making up 27.2% of the population in 2021, India is usually described as the world's largest and youngest democracy. And although this share is projected to fall to 22.7% by 2036, the absolute number of young people will remain very large, at roughly 345 million (NSO, 2022). Parties court this group with promises of jobs and digital opportunity, and analysts treat it as central to the country's demographic dividend. Yet public commentary about the same group is often pessimistic: young Indians are portrayed as absorbed in careers and entertainment, sceptical of parties, and unwilling to invest in organised politics.

This picture of apathy sits uneasily with the recent record of Indian public life. The 2011 India Against Corruption movement, the protests after the Delhi gang rape of December 2012, the rise of the AAP in 2013, and the campus mobilisations of 2015–2016 at Jawaharlal Nehru University and Hyderabad Central University all featured visible youth participation (Lokniti–Centre for the Study of Developing Societies & Konrad Adenauer Stiftung, 2017). Later episodes, including the protests against the Citizenship (Amendment) Act in 2019–2020 (Encyclopaedia Britannica, n.d.-b) and the Agnipath recruitment agitation of June 2022 (Deccan Herald, 2022), point in the same direction. Yet official data show that fewer than 40% of eligible 18- and 19-

year-olds had enrolled to vote ahead of the 2024 Lok Sabha election (Business Standard, 2024a). Evidence of intense engagement and of noticeable absence coexists, and any account of youth politics must explain that coexistence.

This paper enquires whether the language of apathy still describes youth participation in India, or whether participation has simply changedits form. It addressesthree major questions: what the evidence shows about youth participation in electoral and non-electoral politics, how the repertoire of participation has shifted, including through digital technology, and which structural conditions determine whether engagement becomes political influence. The paper argues that the apathy thesis conflates detachment from parties with detachment from politics. Young Indians increasingly combine routine voting with episodic, issue-based protest and digitally mediated expression while remaining largely outside party structures, and this hybrid pattern is uneven across gender, religion, class, and education.

Conceptual Framework:

Political apathy is usually defined as a lack of interest in political activity, but the term has been criticised for treating diverse dispositions as a single deficit. Marsh et al. (2007) argued that what looks like apathy among young Britons is often better described as alienation from formal politics: those who reject parties may still care about issues and act on them elsewhere. Hay (2007) traces popular disaffection to the narrowing of political choice and the idea of decisions being made in technocratic arenas. Following this literature, the paper distinguishes political interest, political participation, and political effectiveness, treating engagement as their combination and apathy as their simultaneous absence, a condition distinct from mere non-partisanship. Verba et al. (1995) add that participation depends on resources of time, money, and civic skill, on motivation, and on recruitment through social networks, conditions that are typically weaker for youth and that help explain the age incline in turnout observed across democracies.

The Changing Repertoire Thesis:

Putnam (2000) read declining associational membership in the United States as eroding social capital, but later scholarship asked whether participation had declined or merely changed form. Norris (2002) argued that activism has been reinvented rather than lost, as citizens move from party agencies to cause-oriented groups and from voting to protest and consumer activism. Dalton (2008) distinguished duty-based citizenship from engaged citizenship, which emphasises autonomy and direct action and is more common among younger cohorts, a pattern Zukin et al. (2006) also found among young Americans. Bennett (2008) described a shift toward self-actualising citizens who express identity through personalised action, and Bennett and Segerberg (2012) showed how digital media enable “connective action” that coordinates individuals without formal organisations. These arguments emerged from mature party systems with declining turnout, so their transfer to India needs care: Indian turnout has risen rather than fallen, and voting remains a meaningful act for marginalised groups. Yadav (2000) described a “second democratic upsurge” of disadvantaged-caste participation in the 1990s, and Ahuja and Chhibber (2012) found that poorer Indians vote at higher rates than the affluent, reading this as a claim-making act.

Youth and Politics in India:

Research on Indian youth spans several strands. Historical accounts trace student mobilisation from the anti-colonial movement through the Bihar movement of 1974–1975, which fed the turbulence preceding the Emergency (Guha, 2007). Lokniti-CSDS survey rounds from 2007, 2011, and 2016 portray a youth population anxious about jobs, attached to government employment, and socially mixed in outlook (Kumar, 2019; Kumar et al., 2009; Lokniti-CSDS & KAS, 2017).

Ethnographic work describes educated but underemployed young men caught in "timepass," extended education substituting for jobs that do not arrive (Jeffrey, 2010). Kaur (2020) examines the fusion of consumer aspiration and nationalist narrative, while Vaishnav (2017) shows how criminally charged candidates and private money shape the supply side of politics in ways likely to breed disenchantment. Chhibber and Verma (2018) document the growing weight of ideology and identity in party competition. What this literature leaves underdeveloped is an integrated view across modes.Studies of turnout, protest, and digital politics are rarely connected, and this paper attempts such an integration.

Method:

This is a conceptual-analytical synthesis of secondary sources rather than a report of primary data collection. The evidence base comprises official statistics and press releases from the Election Commission of India and the Ministry of Statistics and Programme Implementation.Survey findings from the Lokniti-CSDS National Election Study (NES) of 2024, as reported by Kumar and Kumar (2024), and the CSDS-KAS youth survey of 2016 (Lokniti-CSDS & KAS, 2017); documented episodes of youth mobilisation selected for national salience between 2011 and 2025 and relevant scholarship. 'Youth' follows the National Youth Policy 2014 definition of ages 15–29 (Ministry of Youth Affairs and Sports, 2014), though electoral evidence concerns those 18 and above and the Lokniti surveys cover ages 15–34. Age bands therefore differ across sources; self-reported survey data may over-report voting, and protest episodes are illustrative rather than a representative sample; interpretive claims are presented as arguments, not measured effects.

The Apathy Narrative and Its Roots:

The perception of youth apathy has identifiable roots. The Sixty-first Constitutional Amendment of 1988 lowered the voting age from 21 to 18 and substantially widened the electorate (The Constitution [Sixty- First Amendment] Act, 1988, yet the following decades were widely seen as a period of declining student politics. Between 1999 and 2014, youth turnout trailed overall turnout by four to five percentage points (Kumar & Kumar, 2024), consistent with the international pattern of lower turnout among younger citizens. Several structural conditions help explain this gap. The first is economic in the 2016 CSDS-KAS survey, unemployment was the most cited national problem (18%), and about two-thirds of youth said they would choose a government job if given the choice, even though only about 2% were actually employed in the public sector (Lokniti-CSDS & KAS, 2017). When aspiration concentrates on a scarce pool of positions, young adulthood is absorbed by examination preparation, the "timepass" Jeffrey (2010) describes, and time that might go to politics goes instead to waiting. The second condition is disenchantment with the supply side of politics. Criminally charged candidates and private campaign funding (Vaishnav, 2017) reduce the perceived efficacy of participation, so scepticism toward parties may reflect assessment rather than indifference. The third is organisational: close to half of surveyed youth in 2016 were unaffiliated with any party, and most had never taken part in campaign activity (Lokniti-CSDS & KAS, 2017).

Finally, the narrative persists because it relies on a narrow definition of politics. If politics means party membership and campaign work, most young people appear detached; defined more broadly as activity aimed at influencing collective decisions, the picture is more complicated. The same survey found youth interest in politics rising steadily over the decade it covered, and a plurality believed student unions serve an important role and should not be banned (Lokniti-CSDS & KAS, 2017).

Evidence of Changing Patterns:

Overall Lok Sabha turnout was 67.40% in 2019 and 65.79% in 2024, the latter excluding

postal ballots (Business Standard, 2024b; Election Commission of India [ECI], 2024). Youth turnout broadly follows the national pattern, although it remains slightly lower than turnout of older age groups. NES 2024 data reported by Kumar and Kumar (2024) show 62% of first-time voters aged 18–22 and about 65% of all 18–25-year-olds voting, two points lower than in 2019 and two points below other age groups in 2024, with higher youth turnout in Karnataka, West Bengal, Kerala, and Odisha and lower turnout in Delhi, Haryana, and Bihar. Table 1 summarises the main indicators.

Table 1: Selected Indicators of Youth Electoral Participation in India

Indicator	Value	Source
Overall Lok Sabha turnout, 2019	67.40%	Business Standard (2024b)
Overall Lok Sabha turnout, 2024	65.79%	ECI (2024)
Turnout of first-time voters (18–22 years), 2024	62%	Kumar & Kumar (2024)
Turnout of youth (18–25 years), 2024	About 65%	Kumar & Kumar (2024)
Youth turnout relative to other age groups, 2024	About 2 points lower	Kumar & Kumar (2024)
Youth turnout relative to overall turnout, 1999–2014	4–5 points lower	Kumar & Kumar (2024)
Eligible 18–19-year-olds on the electoral rolls, 2024	Below 40%	Business Standard (2024a)

Note. ECI = Election Commission of India. Overall turnout for 2024 excludes postal ballots. Youth turnout figures are self-reported survey estimates from the Lokniti-CSDS National Election Study.

Two features stand outin this figure. The first is that the 2024 youth gap is smaller than the four-to-five-point deficit recorded between 1999 and 2014 (Kumar & Kumar, 2024). Second, the larger problem lies upstream, in enrolment. ECI data from April 2024 showed about 18 million people aged 18–19 on the rolls, fewer than 40% of those eligible, with enrolment especially low in Bihar, Delhi, and Uttar Pradesh (Business Standard, 2024a). Because an unenrolled person cannot vote, this administrative gap may constrain formal participation more than any unwillingness to vote among those already enrolled. Possible contributors include residential mobility for study or work, cumbersome enrolment, and limited awareness; ECI campaigns such as “Turning 18” and “You Are the One,” alongside expanded social-media outreach, target this gap (Kumar & Kumar, 2024).

Protest and Issue-Based Mobilisation:

Protest is also one of the forms of participation. Between 2011 and 2022, a series of youth-inflected mobilisations clustered around corruption, women’s safety, campus freedom, citizenship, and jobs. The Lokniti-CSDS and KAS (2017) report argued that the 2015–2016 campus protests weakened the image of a self-absorbed generation, tracing their roots to unemployment and limited social mobility. In December 2019, the Citizenship (Amendment) Act triggered large protests centred on Jamia Millia Islamia, Jawaharlal Nehru University, and Aligarh Muslim University (Encyclopaedia Britannica, n.d.-b).

The Agnipath agitation of June 2022 illustrates the pattern clearly. After the short-term armed-forces recruitment scheme was announced on 14 June, young aspirants protested across Bihar, Uttar Pradesh, Rajasthan, and Haryana, in places

setting trains alight, and the government raised the 2022 upper age limit from 21 to 23 (Deccan Herald, 2022). Ruling-coalition allies called for the scheme to be reconsidered, and farmers' union leaders linked the agitation to the earlier farm-law protests (Deccan Herald, 2022). The grievance was economic rather than partisan; party actors largely followed rather than led, and the partial concession shows that collective pressure can secure responsiveness even where formal channels are weak — though the violence and the coercive response, including internet suspensions in Haryana, mark the limits of this mode. Related protests over delayed Railway Recruitment Board exams (Deccan Herald, 2022) and recurring paper leaks, which led Parliament to pass the Public Examinations (Prevention of Unfair Means) Act, 2024, show the same grievance-based pattern producing institutional responses.

Digital Participation and Expressive Politics:

Digital media have lowered the cost of participation: posting, sharing, signing petitions, and coordinating through messaging groups require few resources and suit those too young or too dispersed for formal organisation. The 2016 survey found rising social media use among 18–34-year-olds, with WhatsApp and Facebook most popular, though about half of respondents had no exposure yet (Lokniti-CSDS & KAS, 2017); access has likely widened since, though recent youth-specific data are limited. Conceptually, this approximates the "connective action" of Bennett and Segerberg (2012), and the ECI itself now uses X, Instagram, YouTube, and LinkedIn to reach young voters (Kumar & Kumar, 2024). The regional record shows both promise and risk: Nepal's September 2025 youth movement, triggered by a social-media ban, forced the prime minister's resignation within days at a cost of dozens of lives (Encyclopaedia Britannica, n.d.-a), while in India the same platforms host mobilisation alongside misinformation, and governments have used shutdowns in response to unrest, as in Haryana during the Agnipath protests (Deccan Herald, 2022).

Civic and Organisational Participation:

Evidence here is thinner. Close to half of surveyed youth in 2016 were unaffiliated with any party, and most had never taken part in campaign activity (Lokniti-CSDS & KAS, 2017), suggesting organisational politics remains a minority pursuit. Formal political candidacy also begins relatively late.The Constitution sets the minimum age at 25 for the Lok Sabha and state assemblies but 21 for panchayats and municipalities (Constitution of India, arts. 84, 173, 243F, 243V). Volunteering and civil-society involvement are plausible avenues of engagement, but nationally comparable data are scarce, a limitation and a research priority noted here.

Discussion: A Hybrid Repertoire, Unevenly Distributed:

Taken together, the evidence does not support a simple story of movement from apathy to engagement, but it does support a story of changing form. Table 2 organises the findings into five modes of participation and the direction of change each suggests.

Table 2: A Typology of Youth Political Participation in India

Mode	Illustrative activities	Direction of change (author's assessment)
Electoral	Enrolment, voting, campaign work	Broadly stable turnout with a small youth gap; large enrolment gap among 18–19-year-olds
Organisational	Party membership, student wings, unions	Weak; close to half of youth unaffiliated with any party in 2016
Protest	Demonstrations, sit-ins, agitations	Episodic but recurrent, and driven by specific grievances (2011–2022)
Digital	Posting, sharing, online petitions, messaging groups	Expanding, with uneven access and limited systematic data
Civic	Volunteering, community action, civil society campaigns	Cannot be assessed; nationally comparable data are scarce

Note. Assessments are interpretive judgements based on the sources reviewed in this paper, not measured effects.

Voting remains the most widely practised form of participation and has not been displaced; alongside it, young people engage through episodic protest and digital expression while organisational routes remain weak. This is consistent with Dalton's (2008) engaged citizenship and Norris's (2002) reinvention thesis, but with an Indian inflection in which protest and online expression complement rather than replace voting. Where young Indians appear absent inparty membership, campaign work, and youngest-age enrolment, the explanation lies partly in economic waiting, disenchantment with the supply side, and administrative barriers; where visible, the triggers are concrete material and rights-based grievances.

Three qualifications matter. First, participation is unequal: Verba et al. (1995) predict that resources and networks stratify participation, and the 2016 survey found youth in big cities most interested in politics (Lokniti-CSDS & KAS, 2017), with gender, region, and education likely shaping access similarly, though the aggregate sources reviewed cannot quantify this and disaggregated analysis is needed. Second, protest and expression matter democratically only if they connect to representation. The Agnipath concession shows pressure can secure responsiveness, but it involved violence and shutdowns; Nepal's case, where the 2025 youth movement was followed by 2026 elections that a youth-backed party won decisively (Encyclopaedia Britannica, n.d.-a), suggests movements gain durable influence through electoral vehicles, though India's established party system and election administration limit the analogy. Third, digital participation is double-edged, lowering the cost of voice while exposing young people to misinformation and state restriction, so its democratic value depends on media literacy and platform governance as much as on the technology itself.

Implications and Directions for Future Research:

Several implications follow. Enrolment deserves priority over exhortation: since fewer than 40% of eligible 18- and 19-year-olds were on the rolls in 2024 (Business Standard, 2024a), schools and colleges could serve as enrolment points, with simplified residence-update procedures for students and migrants. Civic education should build skills in deliberation and information verification rather than merely describing institutions, since digital participation rewards those skills. Campus democracy also merits attention: youth support for retaining student unions (Lokniti-CSDS & KAS, 2017) suggests transparent student forums could supply the organisational experience party

membership currently does not. Consultation mechanisms on policies that directly affect youth, such as recruitment and examinations, could air grievances before they become agitation, and safeguards for expression and restraint in internet shutdowns would protect the channels many young people now use.

Future research should build panel studies following the same young people across elections, disaggregate participation by gender, caste, region, and class, and compare digital and non-digital participants, alongside qualitative work on why some mobilise, and others abstain.

Conclusion:

Whether youths of India have moved from apathy to engagement admits no single answer, since it presupposes one dimension of participation. Young Indians vote at rates slightly below other age groups, are underrepresented on the rolls at the point of entry, and remain largely outside party structures, yet they have repeatedly mobilised around examination, campus freedom, jobs, and citizenship, and increasingly express political views online. The apathy narrative mistakes non-partisanship and shifting repertoires for indifference.

A more accurate description is a hybrid, issue-centred, digitally mediated pattern of participation, unequally distributed and constrained by economic precarity, administrative barriers, and the uncertain conversion of voice into influence. The challenge for Indian democracy is less about making young people care than about widening the channels through which that care can be exercised, by simplifying enrolment, strengthening civic education, protecting expression, and ensuring that institutions respond to youth claims. Because this paper synthesises secondary evidence, its conclusions remain provisional and call for primary, disaggregated, longitudinal research on how Indian youth participate and with what effect.

References:

1. Ahuja, A., &Chhibber, P. (2012). Why the poor vote in India: "If I don't vote, nobody will listen to me." *Studies in Comparative International Development, 47*(4), 389–410.
2. Bennett, W. L. (2008). Changing citizenship in the digital age. In W. L. Bennett (Ed.), *Civic life online: Learning how digital media can engage youth* (pp. 1–24). MIT Press.
3. Bennett, W. L., &Segerberg, A. (2012). The logic of connective action: Digital media and the personalisation of contentious politics. *Information, Communication & Society, 15*(5), 739–768. https://doi.org/10.1080/1369118X.2012.670661
4. Business Standard. (2024a, April 5). *Lok Sabha polls: Not even 40% of 18 or 19-year-olds registered to vote*. https://www.business-standard.com/elections/lok-sabha-election/lok-sabha-polls-not-even-40-of-18-or-19-year-olds-registered-to-vote-124040500117_1.html
5. Business Standard. (2024b, June 6). *65.79% voter turnout recorded in 2024 elections, postal ballot pending*. https://www.business-standard.com/elections/lok-sabha-election/65-79-voter-turnout-recorded-in-2024-elections-postal-ballot-pending-124060600746_1.html
6. Chhibber, P. K., & Verma, R. (2018). *Ideology and identity: The changing party systems of India*. Oxford University Press.
7. Constitution of India. (1950).
8. The Constitution (Sixty-first Amendment) Act, 1988 (India).
9. Dalton, R. J. (2008). Citizenship norms and the expansion of political participation. *Political Studies, 56*(1), 76–98.
10. Deccan Herald. (2022, June 17). *Centre increases upper age limit to 23 for recruitment under Agnipath scheme*. https://www.deccanherald.com/india/centre-increases-upper-age-limit-to-23-for-recruitment-under-agnipath-scheme-1118816

11. Election Commission of India. (2024). *Press note no. ECI/PN/116/2024* [Press release]. https://elections24.eci.gov.in/docs/BnS4hhbvK9.pdf
12. Encyclopaedia Britannica. (n.d.-a). *2025 Nepalese Gen Z protests*. Retrieved September 20, 2026, from https://www.britannica.com/event/2025-Nepalese-Gen-Z-Protests
13. Encyclopaedia Britannica. (n.d.-b). *What is the Citizenship (Amendment) Act, 2019?* Retrieved September 20, 2026, from https://www.britannica.com/question/What-is-the-Citizenship-Amendment-Act-2019
14. Guha, R. (2007). *India after Gandhi: The history of the world's largest democracy*. Ecco.
15. Hay, C. (2007). *Why we hate politics*. Polity Press.
16. Jeffrey, C. (2010). Timepass: Youth, class, and time among unemployed young men in India. *American Ethnologist, 37*(3), 465–481.
17. Kaur, R. (2020). *Brand new nation: Capitalist dreams and nationalist designs in twenty-first-century India*. Stanford University Press.
18. Kumar, S. (2019). *Youth in India: Aspirations, attitudes, anxieties*. Routledge.
19. Kumar, S., de Souza, P. R., & Shastri, S. (2009). *Indian youth in a transforming world: Attitudes and perceptions*. SAGE Publications.
20. Kumar, S., & Kumar, D. (2024). Youth vote in 2024 Lok Sabha elections. *Studies in Indian Politics, 12*(2), 277–288. https://doi.org/10.1177/23210230241289582
21. Lokniti–Centre for the Study of Developing Societies, & Konrad Adenauer Stiftung. (2017). *Attitudes, anxieties and aspirations of India's youth: Changing patterns*. Centre for the Study of Developing Societies. https://www.lokniti.org/media/upload_files/Lokniti-CSDS%20Youth%20Report%202017.pdf
22. Marsh, D., O'Toole, T., & Jones, S. (2007). *Young people and politics in the UK: Apathy or alienation?* Palgrave Macmillan.
23. Ministry of Youth Affairs and Sports. (2014). *National youth policy 2014*. Government of India. http://www.youthpolicy.org/national/India_2014_National_Youth_Policy.pdf
24. National Statistical Office. (2022). *Youth in India 2022*. Ministry of Statistics and Programme Implementation, Government of India. https://www.mospi.gov.in/sites/default/files/publication_reports/Youth_in_India_2022.pdf
25. Norris, P. (2002). *Democratic phoenix: Reinventing political activism*. Cambridge University Press.
26. Public Examinations (Prevention of Unfair Means) Act, 2024 (India).
27. Putnam, R. D. (2000). *Bowling alone: The collapse and revival of American community*. Simon & Schuster.
28. Vaishnav, M. (2017). *When crime pays: Money and muscle in Indian politics*. Yale University Press.
29. Verba, S., Schlozman, K. L., & Brady, H. E. (1995). *Voice and equality: Civic voluntarism in American politics*. Harvard University Press.
30. Yadav, Y. (2000). Understanding the second democratic upsurge: Trends of Bahujan participation in electoral politics in the 1990s. In F. R. Frankel, Z. Hasan, R. Bhargava, & B. Arora (Eds.), *Transforming India: Social and political dynamics of democracy* (pp. 120–145). Oxford University Press.
31. Zukin, C., Keeter, S., Andolina, M., Jenkins, K., &DelliCarpini, M. X. (2006). *A new engagement? Political participation, civic life, and the changing American citizen*. Oxford University Press.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Public Policy, Welfare, and Social Justice: Reimagining the Indian Social Contract in the 21st Century

Veena Mane
Faculty, Department of Political Science,
Soniya BA and BCOM Degree College, Dharwad
Corresponding Author – Veena Mane
DOI - 10.5281/zenodo.23058967

Abstract:

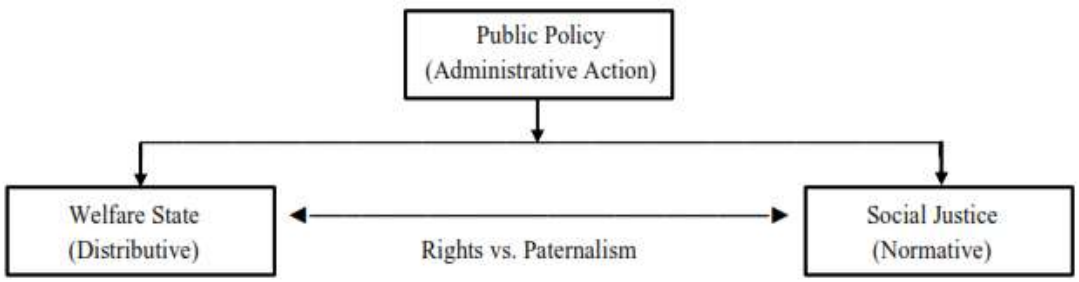
Public policy in a developing democracy serves as the primary instrument for operationalizing constitutional promises of social justice and equity. In the post-independence era, India's approach to welfare has evolved from a state-led development paradigm into a fragmented safety net, and more recently, toward a digitalized, direct-benefit framework. This paper critically examines the intersection of public policy, state-sponsored welfare programs, and the normative ideal of social justice within contemporary India. Grounded in John Rawls' Theory of Justice, Amartya Sen's Capability Approach, and B.R. Ambedkar's vision of social democracy, this study analyzes how institutional mechanisms address structural inequalities rooted in caste, gender, class, and regional disparities.

Evaluating major policy shifts—including rights-based legislation like the Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGA), the National Food Security Act (NFSA), and recent tech-driven initiatives such as the Jan Dhan-Aadhaar-Mobile (JAM) trinity—the article maps both successes and emerging vulnerabilities. Furthermore, it addresses pressing contemporary disruptions, including climate change, informal labor vulnerability, and digital exclusion. The paper argues for a paradigm shift from top-down "paternalistic welfare" to an empowering, capacity-building framework that upholds social justice not merely as a distributive exercise, but as a foundational democratic right.

Keywords: Public Policy, Social Justice, Welfare State, Capability Approach, Rights-Based Framework, Digital Inclusion, India.

Introduction: The Triad of State, Policy, and Justice:

Public policy is the principal mechanism through which a sovereign state translates its political philosophy into actionable governance. In deeply heterogeneous and stratified societies, public policy is not merely an administrative exercise in resource allocation; it is a normative project aimed at restructuring social relationships and mitigating historical disadvantages. The core of this intervention lies in the intersection of three key concepts: **Public Policy**, **Welfare**, and **Social Justice**.



Historically, the concept of welfare was viewed through the lens of state benevolence—a collection of safety nets designed to prevent extreme poverty. However, modern political theory, particularly within post-colonial contexts, redefines welfare as an instrument of social justice. Social justice asserts that every individual is entitled to equal political, economic, and social rights, along with equitable access to opportunities.

In India, this triad carries unique historical and constitutional weight. The Indian nation-state emerged from colonial exploitation alongside deeply entrenched social hierarchies dictated by the caste system, patriarchy, and economic feudalism. Consequently, the framing of Indian public policy was explicitly tasked with dual obligations: achieving economic growth and executing a social revolution.

As India navigates the complexities of the 21st century—marked by rapid economic growth alongside widening inequality, technological disruptions, and environmental shifts—the relationship between state policy and social justice requires continuous re-examination. This paper examines how public policy has shaped human development and social equity in India, identifies structural bottlenecks, and outlines a progressive agenda for democratic welfare reform.

Theoretical and Philosophical Foundations:

To evaluate public policy through the lens of social justice, it is essential to establish the theoretical frameworks that define equitable distribution and political obligation.

	Theoretical Foundations	
John Rawls • Difference Principle • Fair Equality of Opportunity	Amartya Sen • Capability Approach • Freedom & Agency Functionings	B. R. Ambedkar • Social • Democracy Affirmative

1. Rawlsian Justice and the Difference Principle:

John Rawls, in *A Theory of Justice* (1971), formulated a procedural framework for justice based on the concept of fairness. Central to Rawlsian thought is the **Difference Principle**, which asserts that socio-economic inequalities are permissible only if they yield the maximum benefit to the least-advantaged members of society. In public policy, this principle provides a moral justification for progressive taxation, affirmative action, and targeted welfare spending. Policies must actively prioritize the marginalized rather than maintaining a neutral stand.

2. Amartya Sen's Capability Approach:

While traditional economic welfare models measure progress via income or consumption metrics, Amartya Sen and Martha Nussbaum introduced the **Capability Approach**. Sen argues that social justice depends on enhancing individuals' actual capabilities—their freedom to achieve valuable state of "beings and doings" (functionings). Under this view:

- Poverty is recognized as **capability deprivation**, not merely income insufficiency.
- Welfare policies must move beyond distributing commodities (like grain or cash) to creating environments where individuals receive quality education, healthcare, political voice, and bodily integrity.

3. B.R. Ambedkar and the Vision of Social Democracy:

For the Indian context, Dr. B.R. Ambedkar provides the most imperative theoretical and practical framework. Ambedkar emphasized that political democracy cannot survive without

underlying social democracy. On November 25, 1949, addressing the Constituent Assembly, Ambedkar cautioned:

"We must make our political democracy a social democracy as well. Political democracy cannot last unless there lies at the base of it social democracy. What does social democracy mean? It means a way of life which recognizes liberty, equality and fraternity as the principles of life."

Ambedkar understood that formal legal equality (one person, one vote) is insufficient when social structures enforce systemic oppression. Therefore, public policy must serve as an active weapon for dismantling social hierarchies through reservations, public education, legal protections, and fair economic access.

Constitutional Architecture of Social Justice in India:

The Constitution of India serves as the primary manifesto for social justice, embedding welfare commitments across its structure

Indian Constitution	
Fundamental Rights (Part III)	Directive Principles (DPSP) ((Part IV)
• Articles 14-18: Equality • Article 15(4): AffirmativeAction • Article 17: Abolition of Untouchability	• Article 38: Social Order • Article 39: Economic Justice • Article 41: Right toWork • Article 46: SC/ST/Weak Sections Protection

1. Preamble as the Moral Compass:

The Preamble explicitly sets the mandate for the Republic: securing for all citizens **"JUSTICE, social, economic and political."** The placement of *social* justice before *economic* and *political* reflects the framers' understanding that social emancipation is a prerequisite for genuine political participation and economic equity.

2. Fundamental Rights (Part III):

Part III offers enforceable guarantees against state and social discrimination:

- **Articles 14 to 18:** Establish equality before the law and prohibit discrimination based on religion, race, caste, sex, or place of birth.
- **Article 15(4) and 16(4):** Provide constitutional backing for affirmative action (reservations) in educational institutions and public employment for Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs).
- **Article 17:** Abolishes the practice of "Untouchability," turning a social evil into a punishable offense.

3. Directive Principles of State Policy (Part IV):

While non-justiciable in a court of law, Part IV sets the operational guidelines for policymaking:

- **Article 38:** Directs the state to secure a social order for the promotion of the welfare of the people and minimize inequalities in income, status, facilities, and opportunities.
- **Article 39:** Mandates that the ownership and control of material resources be distributed to best serve the common good, preventing the concentration of wealth.
- **Article 41 & 46:** Call upon the state to ensure the right to work, education, and public assistance, protecting weaker sections from social injustice and exploitation.

Historical Trajectory of Welfare Policies in Post-Independence India:

India's approach to welfare and social development can be divided into four distinct economic and political phases.

Evolution of Public Policy in India			
Phase 1: 1950-1970 Scheduled Planning & State Led Development	Phase 2: 1970-1990 Redistributive &Targeted Safety Nets	Phase 3: 1991-2014 Rights-Based Legislation Framework	Phase 4: 2014+ Neo-Welfarism &Digital Direct Delivery

Era / Phase	Policy Approach	Key Initiatives & Focus	Structural Limitations
Phase 1 (1950–1970s)*Planning Era*	State-led industrialization, Nehruvian socialist model, import substitution.	Five-Year Plans, major infrastructure projects, basic public sector building.	Neglected primary education and basic healthcare; trickledown economics failed to reach marginalized groups.
Phase 2 (1970s–1980s)*Targeted Populism*	Direct poverty alleviation (*Garibi Hatao*), expansion of state subsidies.	Integrated Rural Development Programme (IRDP), early Public Distribution System (PDS).	High leakage rates, bureaucratic inefficiency, patron-client political dependency.
Phase 3 (1990s–2010s)*Rights-Based Approach*	Post-LPG reforms; shift from welfare as charity to legally enforceable rights.	MGNREGA (2005), RTI (2005), RTE (2009), NFSA (2013).	Implementation gaps, state-level fiscal constraints, uneven institutional capacity.
Phase 4 (2014–Present)*Neo-Welfarism*	Direct benefit transfers (DBT), digital public infrastructure (DPI), targeted asset creation.	PM-KISAN, PM Awas Yojana, Ayushman Bharat, Jal Jeevan Mission, JAM Trinity.	Focus on physical assets/cash over public health/education service delivery; digital exclusion risks.

Critical Analysis of Key Welfare Paradigms:

To understand how public policy impacts social justice, we must evaluate the performance, innovations, and limitations of major structural programs.

1. The Rights-Based Paradigm: Employment and Food Security:

The paradigm shift of the mid-2000s legally empowered citizens to demand state resources.

MGNREGA (Mahatma Gandhi National Rural Employment Guarantee Act, 2005)

- **Design:** Guarantees 100 days of wage employment per financial year to rural households willing to do unskilled manual work.
- **Social Justice Outcomes:**
  Acts as a baseline wage floor in rural labor markets.
  Promotes gender equity: Women account for over 50% of the workforce in most states due to equal pay mandates.
  Reduces distress migration among Scheduled Castes and Scheduled Tribes.
- **Challenges:** Chronic delays in wage payments, lower allocation relative to demand, and variable implementation across states.

National Food Security Act (NFSA), 2013:

- **Design:** Covers up to 75% of the rural population and 50% of the urban population,

providing subsidized food grains through the Targeted Public Distribution System (TPDS).

- **Social Justice Outcomes:** Protects vulnerable groups from nutritional insecurity and extreme poverty during economic shocks (such as the COVID-19 pandemic).
- **Challenges:** Inclusion and exclusion errors, regional variations in food grain distribution quality, and high fiscal subsidy burdens.

2. The "Neo-Welfarism" and Digital Public Infrastructure (DPI) Paradigm:

In recent years, Indian welfare policy has shifted toward what economists call "Neo-Welfarism"—a focus on the efficient, technology-driven delivery of private goods (like toilets, housing, cooking gas, and direct cash) rather than basic public goods (like education and health).

JAM Trinity Infrastructure		
Jan Dhan Yojana (Universal Banking)	Aadhaar (Biometric ID Verification)	Mobile Network (Real-Time Communication)
Direct Benefit Transfer (DBT Engine)		

- **The JAM Trinity (Jan Dhan-Aadhaar-Mobile):** Has transformed subsidy distribution by minimizing intermediary leakage and lowering transaction costs.
- **Targeted Asset Creation:** Schemes like *PM Awas Yojana* (Housing) and *Jal Jeevan Mission* (Tap Water Access) address fundamental quality-of-life indicators.
- **Critical Concerns:**
  1. **Digital Exclusion:** Algorithmic errors, biometric authentication failures, and connectivity gaps often exclude rural elderly, disabled, or illiterate beneficiaries.
  2. **The Public Service Void:** A focus on direct cash transfers cannot substitute for well-funded, high-quality public schools and hospitals. Cash cannot buy quality public goods in a broken market.

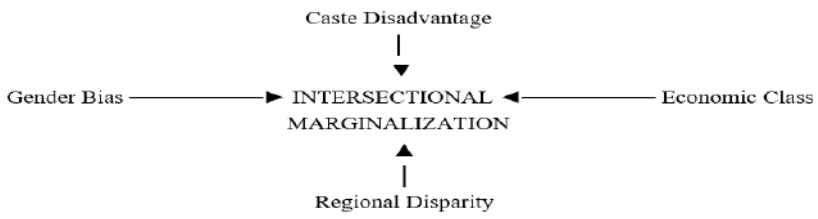
Contemporary Challenges to Social Justice and Welfare:

Despite multi-decade welfare interventions, public policy in India faces structural obstacles that perpetuate socioeconomic divides.

Persistent Challenges in Public		
Intersectionality ● Caste-Gender Nexus ● Spatial Disparity	Inequality Crisis ● Top 1% Wealth ● Concentration	Informal Sector ● 90% Informal Labor ● Lack of Social Security

1. The Persistence of Intersectional Inequality:

Social disadvantage in India is rarely single-dimensional; it operates at the intersection of caste, gender, class, and geography.



- **Caste and Class:** While affirmative action has expanded political representation, social capital and high-value economic opportunities remain unevenly concentrated. Caste-based occupational hazards (such as manual scavenging) highlight major execution gaps in protective legislation.
- **Gender Disparity:** India's Female Labor Force Participation Rate (FLFPR) remains low compared to global peers. Unpaid care work, safety concerns, and patriarchal social norms reduce the structural impact of gender-focused policies

2. The Growing Wealth and Income Gap:

Recent global wealth reports highlight a sharp concentration of capital in India. While economic liberalization produced significant wealth, the benefits have accrued unevenly:

- The top 1% of the population holds a disproportionate share of national wealth, while the bottom 50% relies heavily on state food subsidies for daily survival.
- This divergence risks converting democratic politics into an oligarchy, where policy choices prioritize corporate interests over social welfare spending.

3. Informalization of the Labor Force:

Over 90% of India's workforce operates within the informal sector—lacking written contracts, paid leave, health insurance, or pension protections. The rise of the platform gig economy has further fragmented the labor force. Public policy has struggled to create enforceable safety nets for gig and platform workers, leaving millions vulnerable to economic downturns.

4. The Structural Crisis in Health and Education:

Public investment in essential social infrastructure remains low relative to GDP:

- **Healthcare:** Public health spending hovering around 1.2% to 1.5% of GDP leads to high out-of-pocket health expenditures, driving millions into poverty every year.
- **Education:** Despite the Right to Education (RTE) Act, public schools face chronic underfunding, teacher shortages, and poor learning outcomes (as documented in successive ASER reports). This creates a two-tiered system: low-quality public education for the poor and expensive private education for the privileged.

Policy Recommendations and the Future Framework:

To bridge the gap between constitutional principles and actual outcomes, Indian public policy must adopt a multi-dimensional reform strategy.

Strategic Reform Agenda	
1. Universal Healthcare 2. Primary Education Reform 3. Social Security for Informal Sector 4. Universal Basic Services 5. Progressive Fiscal Reform	1. Increase public spending to 2.5%-3% GDP 2. Modernize public infrastructure 3. Universal pension/health coverage for gig/informal workforce 4. Move from cash transfers to quality 5. Estate/wealth taxation for welfare fund

1. Transitioning from "Cash" to "Capabilities":

Direct cash transfers provide essential relief, but they cannot replace public institutional services. The state must rebalance its budget priorities to build robust public health infrastructure, invest heavily in early childhood and primary education, and strengthen local municipal and panchayat-level institutions.

2. Formalization and Universal Social Protection:

Public policy must decouple basic social security from formal employment status. A universal social protection framework should include:

- Portable social security accounts for migrant labor.
- Statutory health insurance and emergency income support for gig and platform workers.
- Institutional strengthening and inflation-indexed wage revisions for MGNREGA.

3. Democratic Decentralization and Participatory Governance:

Top-down policymaking often misunderstands local needs. Per the 73rd and 74th Constitutional Amendments, power, resources, and administrative capacity must be systematically devolved to Gram Panchayats and Urban Local Bodies (ULBs). Participatory budgeting and mandatory social audits (on the model of Rajasthan's accountability legislations) ensure transparency and reduce corruption.

4. Progressive Fiscal Policy:

To fund comprehensive welfare without widening fiscal deficits, India requires progressive tax policy adjustments:

- Rationalizing indirect taxes (GST) on basic consumer items that burden low-income households.
- Exploring modest wealth and inheritance taxes targeted at extreme wealth concentration to directly fund public healthcare and education systems.

Conclusion:

Public policy is never politically neutral; it reflects a society's values, priorities, and moral commitments. In India, the Constitution outlines a clear imperative: public policy must actively work toward dismantling historical oppression, reducing inequality, and guaranteeing human dignity for every citizen.

While post-independence India has made remarkable strides in mitigating absolute poverty, expanding technology-driven governance, and maintaining democratic continuity, its social contract remains incomplete. True social justice cannot be achieved through minimalist safety nets or paternalistic state hand-outs. It requires an empowering social state—one that builds human capabilities, guarantees fundamental socio-economic rights, and ensures equal opportunity regardless of caste, gender, or class.

As India asserts its place as a growing global economic power, its ultimate success will be judged not by the total GDP or the number of billionaires it produces, but by its commitment to uplift the most vulnerable citizen at the bottom of the socio-economic ladder. Aligning public policy with the constitutional vision of social democracy remains our most important collective imperative.

References:

1. Ambedkar, B. R. (1949). Speech in the Constituent Assembly on the Adoption of the Constitution of India, November 25, 1949. Government of India.
2. Dreze, J., & Sen, A. (2013). An Uncertain Glory: India and its Contradictions. Princeton University Press.
3. Rawls, J. (1971). A Theory of Justice. Harvard University Press.
4. Sen, A. (1999). Development as Freedom. Oxford University Press.
5. Government of India. (2023). Economic Survey 2022-23. Ministry of Finance, Department of Economic Affairs.
6. Khera, R. (2011). The Battle for Employment Guarantee. Oxford University Press.
7. Piketty, T. (2020). Capital and Ideology. Harvard University Press.
8. World Inequality Lab. (2024). World Inequality Report: Income and Wealth Inequality in India.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Civic Engagement and Digital Governance in Karnataka

Dr. Sangamesh I. Patil
Lecturer Department of Political Science,
Shrik M Mamani Government First Grade College, Soundatti, Karnataka, India
Corresponding Author – Dr. Sangamesh I. Patil
DOI - 10.5281/zenodo.23058985

Abstract:

The rapid expansion of digital technologies has transformed the nature of governance and the relationship between the state and society. In Karnataka, digital governance has increasingly become an important instrument for delivering public services, improving administrative efficiency, facilitating access to information, and strengthening citizen–government interaction. At the same time, civil society organizations (CSOs), non-governmental organizations (NGOs), community-based organizations, social movements, and citizen networks are assuming new roles in the digital governance process. This article examines the changing role of civil society in Karnataka's digital governance ecosystem, with particular emphasis on citizen participation, transparency, accountability, digital public services, grievance redressal, social monitoring, and access to information. It also examines contemporary challenges associated with the digital divide, digital literacy, misinformation, data privacy, cybersecurity, and the emerging use of Artificial Intelligence (AI) in public administration. The article argues that digital governance should not be viewed merely as the digitization of government services but as a broader transformation of state–society relations and democratic participation. Effective collaboration between government institutions and civil society, combined with inclusive digital policies and responsible technological practices, can contribute to more participatory, transparent, accountable, and citizen-centred governance in Karnataka.

Keywords**: **Civil Society, Digital Governance, E-Governance, Karnataka, Citizen Participation, Transparency, Accountability, Digital Divide, Artificial Intelligence.

Introduction:

Information and communication technologies have transformed public administration by enabling digital public services, citizen communication, grievance redressal and efficient administration. Karnataka has made significant progress in digital governance through initiatives such as Seva Sindhu, Bangalore One, Karnataka One and Grama One. According to the 2025 National e-Governance Service Delivery Assessment, Karnataka offered 2,092 e-services through Seva Sindhu and achieved 100% saturation of assessed mandatory e-services. Digital governance is not only about providing online services; citizens must also be able to access, understand, use and monitor them. In this context, civil society organizations (CSOs) play an important role by helping citizens access government services, information and grievance mechanisms, while also promoting participation, transparency and accountability. Therefore, the relationship between civil society and digital governance in Karnataka deserves systematic study.

Civil Society and Digital Governance in Karnataka:

Concept of Digital Governance:

Digital governance refers to the use of digital technologies, information systems, online platforms and communication technologies by government institutions to improve public administration and service delivery. It includes

online public services, digital records, grievance redressal, online payments, access to government information, citizen participation, data-based administration, monitoring and the use of emerging technologies such as Artificial Intelligence (AI). Digital governance represents a shift from traditional administration towards more efficient, transparent, accessible and citizen-oriented governance. Karnataka's Seva Sindhu is an important example, integrating multiple government services through digital platforms.

Civil Society: Meaning and Importance:

Civil society broadly includes voluntary organizations, NGOs, community groups, associations, social movements, citizen groups and other collective institutions operating between the state, market and individual citizens. Civil society performs important democratic functions such as representing public interests, creating awareness, mobilizing communities, protecting rights, monitoring government programmes, advocating public issues and promoting accountability.In the digital era, these functions are increasingly carried out through websites, social media, online platforms and digital communication. Civil society organizations can help citizens understand government schemes, access digital services, submit grievances and communicate their concerns to public authorities.

Digital Governance in Karnataka:

Karnataka has been an important state in India's e-governance development. Initiatives such as Bhoomi for computerized land records, Bangalore One for integrated citizen services and Sakala for time-bound public service delivery have contributed to the state's digital governance framework.Today, digital governance in Karnataka covers citizen services, land records, taxation, welfare programmes, certificates, grievance redressal, digital payments, public information and urban governance. The 2025 National e-Governance Service Delivery Assessment (NeSDA) reported that Karnataka had 2,092 e-services through Seva Sindhu, demonstrating the extensive development of its digital service ecosystem.

Role of Civil Society in Digital Governance

Civil society can contribute to digital governance in several ways:

1. **Citizen Participation:** CSOs can help citizens submit complaints, provide feedback, participate in consultations, access information and communicate with public officials. They can particularly assist citizens with limited digital skills.
2. **Transparency:** Digital platforms make government orders, policies, budgets, schemes, service standards and other information more accessible. Civil society can examine such information and explain it to communities in simple language.
3. **Accountability:** Digital systems allow citizens to track applications and grievances. CSOs can identify recurring service-delivery problems, document citizen experiences and bring these issues to government authorities.
4. **Public Service Delivery:** CSOs can create awareness about government services, explain eligibility and application procedures, assist digitally excluded citizens and communicate service-delivery problems to authorities.
5. **Grievance Redressal:** Civil society can help citizens register and track complaints, identify unresolved grievances and communicate systemic problems to government departments.
6. **Social Monitoring:** Community organizations can use digital tools to monitor welfare programmes, public infrastructure, education, health services, rural development and public expenditure. This can create a feedback process between citizens and government.

Digital Divide and Digital Literacy:

A major challenge of digital governance is the digital divide. Citizens differ in access to internet connectivity, smartphones, digital literacy, income, language, education and technological skills. Rural citizens, elderly persons and marginalized communities may face greater difficulties.

Digital literacy is also essential. Citizens need to know how to complete online applications, upload documents, understand digital notifications, protect passwords and identify fraudulent messages. In Karnataka, Kannada-language accessibility is particularly important for inclusive digital participation. Civil society organizations can address these problems through digital literacy programmes, community training, assistance centres and local-language awareness programmes.

Misinformation, Data Privacy and Cybersecurity:

Digital governance also creates new challenges. Misinformation and disinformation can reduce public trust and create confusion about government programmes and public information. Civil society can promote fact-checking, media literacy and responsible digital communication. At the same time, digital governance involves the collection of large amounts of citizen data. Risks include unauthorized access, data breaches, identity theft, cyber fraud and misuse of personal information. Therefore, digital governance must combine technological efficiency with data privacy, cybersecurity and accountability.

Artificial Intelligence and Public Administration:

Artificial Intelligence is becoming increasingly relevant to public administration. AI can support data analysis, chatbots, grievance classification, fraud detection, predictive analysis and administrative decision support. However, its use also raises concerns about algorithmic bias, transparency, explainability, privacy and human oversight.Civil society can contribute to public discussions on the ethical and responsible use of AI. Human responsibility should remain important in administrative decision-making.

Government–Civil Society Partnership:

Effective digital governance requires cooperation between government institutions and civil society.

A possible model is: Government → Digital Infrastructure → Civil Society → Citizen Awareness and Participation → Feedback and Monitoring → Administrative Response → Accountable Governance**.** Such collaboration can strengthen communication between citizens and government and make digital services more inclusive and responsive.

Major Challenges:

1. Digital divide and unequal internet access
2. Limited digital literacy
3. Language barriers
4. Cybersecurity and data privacy concerns
5. Misinformation and online fraud
6. Exclusion of vulnerable groups
7. Limited institutional capacity of some CSOs
8. Lack of awareness about digital services
9. Weak mechanisms for incorporating citizen feedback
10. Algorithmic bias and ethical concerns related to AI

Suggestions:

1. Strengthen digital literacy through training programmes, especially in rural areas.
2. Promote Kannada-language digital services for easy access to government information.
3. Improve grievance redressal through online tracking and timely solutions.
4. Encourage civil society participation in government consultations and policy discussions.
5. Protect citizen data and maintain offline services for people who cannot use digital platforms.

Major Findings:

1. Digital governance has expanded citizen interaction with government institutions in Karnataka.
2. Civil society organizations act as important intermediaries between citizens and government.
3. Digital platforms improve transparency, grievance redressal and citizen participation.
4. The digital divide, misinformation, cybersecurity and data privacy remain major challenges.
5. AI and digital technologies offer opportunities but require transparency, accountability and democratic oversight.

Conclusion:

Digital governance has significantly transformed public administration in Karnataka by expanding access to public services, information and grievance mechanisms. However, technology alone cannot ensure inclusive and accountable governance. Civil society organizations play an important intermediary role by creating awareness, supporting digital inclusion, monitoring public services, promoting transparency and facilitating citizen participation. The future of digital governance in Karnataka depends not only on expanding digital infrastructure but also on digital literacy, accessibility, privacy protection, responsible technology and meaningful government–civil society cooperation. A citizen-centred approach can help ensure that digital transformation contributes to more transparent, participatory and accountable governance.

References:

1. Department of Administrative Reforms and Public Grievances. (2025). National e-Governance Service Delivery Assessment (NeSDA) 2025. Government of India.
2. Department of Administrative Reforms and Public Grievances. (2021). National e-Governance Service Delivery Assessment 2021. Government of India.
3. Government of Karnataka. (n.d.). Seva Sindhu: Government of Karnataka. Government of Karnataka.
4. Government of Karnataka. (n.d.). Greater Bengaluru Authority. Government of Karnataka.
5. World Bank. (2019). Bangalore One, Government of Karnataka, India: Public Private Partnership. World Bank.
6. World Bank. (2025). Digital Public Infrastructure: Setting Standards with the Hourglass Model. World Bank.
7. Government of Karnataka. (2026). Karnataka Varthe: Digital governance and AI-related policy developments. Government of Karnataka.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

BRICS 2026: Emerging Dimensions of Multi polarity and Global Governance

Dr. Gurupadayya N. Hiremath
Faculty, P.G. Department of Political Science,
BLDE Associations, Commerce, B.H.S Arts & T.G.P Science College Jamakhandi 587301
Corresponding Author – Dr. Gurupadayya N. Hiremath
DOI - 10.5281/zenodo.23059021

Abstract:

The international system is undergoing significant transformation as emerging powers increasingly seek greater representation in global decision-making. Within this changing environment, BRICS has developed from a grouping of five major emerging economies into a broader platform connecting emerging markets and developing countries. The 2026 BRICS Summit, held in New Delhi on 12–13 September under India's chair ship, marked the twentieth anniversary of BRICS and placed particular emphasis on resilience, innovation, cooperation and sustainability. The New Delhi Declaration reaffirmed the group's commitment to multipolarity, multilateralism, reform of global governance, greater representation of emerging markets and developing countries, sustainable development and economic cooperation.

This paper examines the emerging dimensions of multipolarity and global governance associated with BRICS 2026. It analyses BRICS' evolution, the significance of its expansion, its engagement with the United Nations and international financial institutions, the role of the New Development Bank, cross-border payments, technological cooperation, Global South representation and development-oriented multilateralism. The paper also examines the institutional and political challenges arising from the diversity of BRICS members, differences in national interests, questions of cohesion and the difficulty of converting collective declarations into effective institutional outcomes.

The paper argues that BRICS should be understood neither simply as a replacement for the existing international order nor merely as an economic coalition. Rather, it represents an important platform through which emerging and developing states seek to increase their participation in global governance while promoting a more distributed international system. Its future significance will depend on its capacity to transform political declarations into sustained institutional cooperation, while maintaining consensus among increasingly diverse members.

Keywords: BRICS, Multipolarity, Global Governance, Global South, Multilateralism, Emerging Economies, New Development Bank, International Relations, India, BRICS 2026.

Introduction:

The contemporary international system is characterized by rapid geopolitical, economic, technological and institutional changes. The distribution of economic and political capabilities has become more dispersed, while emerging powers increasingly demand greater participation in institutions that formulate international rules. At the same time, global challenges such as climate change, economic inequality, technological disruption, food and energy insecurity, pandemics and geopolitical conflicts have demonstrated the limits of unilateral approaches to international problem-solving.

Against this background, BRICS has become an important platform for cooperation among major emerging and developing countries. The term BRIC was initially associated with Brazil, Russia, India and China and subsequently developed into an institutionalized political and economic grouping. South Africa joined in 2011, transforming BRIC into BRICS. Further expansion

occurred from 2024, when Egypt, Ethiopia, Iran and the United Arab Emirates became members, followed by Indonesia in 2025. The expansion has significantly broadened BRICS' geographical and political representation. The Ministry of External Affairs of India records these stages of expansion and identifies the growing network of BRICS cooperation.

The 2026 BRICS Summit held in New Delhi on 12–13 September represented an important stage in this evolution. India chaired the eighteenth BRICS Summit under the theme **"Building for Resilience, Innovation, Cooperation and Sustainability."** The summit took place during the twentieth anniversary year of BRICS. The New Delhi Declaration emphasized strengthening cooperation among the expanded membership, reforming global governance, strengthening multilateralism and multipolarity, promoting sustainable development and increasing the participation of emerging markets and developing countries in international decision-making.

The idea of multipolarity is central to understanding BRICS. Multipolarity refers broadly to an international system in which power and influence are distributed among several significant centres rather than concentrated predominantly in one dominant power. However, contemporary multipolarity is not necessarily limited to military power. It can include economic, financial, technological, diplomatic, institutional and cultural dimensions.

BRICS' importance therefore extends beyond its combined economic weight. Through institutions such as the New Development Bank, mechanisms for financial cooperation, scientific and technological networks, people-to-people exchanges and diplomatic coordination, BRICS seeks to create additional channels of international cooperation. At the same time, its members continue to participate in established institutions such as the United Nations, International Monetary Fund and World Bank.

The central issue examined in this paper is therefore how BRICS 2026 contributes to the emergence of a more multipolar approach to global governance and what opportunities and challenges this development creates for international relations.

Statement of the Problem:

The existing international institutional architecture was largely constructed in the aftermath of the Second World War. Although the global economy and distribution of power have changed considerably, developing and emerging countries continue to debate whether their representation in major international institutions adequately reflects contemporary realities.

BRICS has emerged partly from these concerns. The creation of the New Development Bank, the Contingent Reserve Arrangement and other mechanisms reflected demands for greater developing-country participation in international financial governance. Academic research on the New Development Bank notes that its origins were connected to dissatisfaction with the mismatch between the development needs and economic importance of emerging countries and their representation within established financial institutions.

The expansion of BRICS has increased its geographical reach but has simultaneously introduced greater diversity. The members have different political systems, economic structures, strategic interests and regional priorities. Consequently, the expansion raises an important research question: can BRICS develop a sufficiently coherent institutional identity to contribute effectively to global governance while maintaining the diversity that constitutes much of its appeal?

Objectives of the Study:

The study has the following objectives:

1. To examine the evolution of BRICS and its changing role in international relations.
2. To analyse the concept of multipolarity in the context of BRICS 2026.

3. To examine the major global-governance priorities articulated at the 2026 New Delhi Summit.
4. To analyse BRICS' contribution to the representation of the Global South.
5. To examine the role of the New Development Bank and financial cooperation.
6. To assess BRICS cooperation in technology, innovation and sustainable development.
7. To identify the major challenges confronting BRICS as an expanded grouping.
8. To examine the possible implications of BRICS for the future architecture of global governance.

Research Methodology:

This study adopts a **qualitative, descriptive and analytical methodology**. It is primarily based on secondary sources.

The principal sources include:

- BRICS summit declarations;
- Government of India documents;
- Ministry of External Affairs publications;
- official statements concerning India's BRICS chair ship;
- academic journal articles;
- books and scholarly literature on multipolarity and global governance;
- research on the New Development Bank;
- policy and institutional documents concerning international financial cooperation.

The paper uses content analysis to identify major themes emerging from the 2026 New Delhi Declaration, particularly multipolarity, multilateralism, economic governance, financial cooperation, technology, sustainable development and Global South representation.

The study does not treat BRICS statements as independent evidence of outcomes. Rather, official declarations are examined as statements of member-state priorities and commitments, while academic literature is used to assess the broader significance and limitations of these developments.

Conceptual Framework: Multipolarity and Global Governance:

Meaning of Multipolarity:

Multipolarity refers to an international system in which several major centres of power influence international affairs. These centres may possess different combinations of economic, political, military, technological and diplomatic capabilities.

In classical international-relations theory, polarity is often associated with the distribution of material capabilities among major powers. Contemporary global governance, however, is more complex. Power is exercised not only through military capabilities but also through finance, trade, technology, institutions, standards, knowledge and networks.

Consequently, the emerging international system may be described as having multiple and overlapping centres of influence.

Multi polarity and Multilateralism:

Multipolarity should be distinguished from multilateralism. Multipolarity concerns the distribution of power, whereas multilateralism concerns cooperation among multiple states through commonly accepted institutions, rules and procedures.

BRICS' 2026 declaration links these two concepts. The members reaffirmed their commitment to strengthening both **multilateralism and multipolarity**, while emphasizing the continuing central role of the United Nations and international law.

This is significant because BRICS does not formally present itself as seeking to abolish the existing multilateral system. Instead, its declarations emphasize reform and greater representation within international governance.

Evolution of BRICS:

BRICS has undergone substantial transformation since the first BRIC summit in 2009. The addition of South Africa in 2011 strengthened its African dimension. The 2024 expansion brought

Egypt, Ethiopia, Iran and the United Arab Emirates into the grouping, while Indonesia joined in 2025.

This transformation has changed the nature of BRICS in several ways.

- First, BRICS is increasingly geographically diverse. Its membership extends across Latin America, Eurasia, Africa, the Middle East and Asia.
- Second, its agenda has expanded beyond economic cooperation. BRICS now discusses international security, development, technology, climate issues, financial cooperation, health, education, culture and people-to-people relations.
- Third, the grouping has developed institutional mechanisms. The New Development Bank and the Contingent Reserve Arrangement are examples of institutionalization beyond annual summit diplomacy.
- Fourth, BRICS has become increasingly associated with the political representation of emerging markets and developing countries.
- The 2026 New Delhi Declaration explicitly connected BRICS' expansion with its role as a platform for inclusive global governance, while also recognizing the need for stronger coordination and long-term institutional development.

BRICS 2026 and India's Chair ship:

India's 2026 BRICS chair ship placed four concepts at the centre of its agenda: **resilience, innovation, cooperation and sustainability**.

The Indian government described the chair ship as people-centred and focused on development-oriented cooperation. Youth, innovation, entrepreneurship and sustainable development were incorporated into the wider programme.

The New Delhi Declaration reported that more than 400 meetings and engagements involving ministers, parliamentarians, officials, experts, businesses and civil-society actors were organized across 30 Indian cities during the chair ship. According to the declaration, these activities were intended to strengthen cooperation in resilience, innovation, sustainable development and people-to-people exchanges.

The significance of India's chair ship lies partly in its attempt to connect high-level geopolitical discussions with development-oriented cooperation.

The 2026 agenda therefore illustrates an important characteristic of contemporary BRICS: its emphasis is not confined to traditional strategic competition. Economic development, technology, sustainability and human development have become increasingly important components of its agenda.

BRICS and Reform of Global Governance:

One of the most important dimensions of BRICS 2026 is its position on reforming global governance.

The New Delhi Declaration called for a more representative, equitable, effective, responsive, legitimate, democratic and accountable multilateral system. It also reaffirmed the central role of the United Nations and the importance of the UN Charter.

This position reflects a reform-oriented approach. BRICS countries have consistently argued that international institutions should better reflect contemporary economic and demographic realities. The 2026 declaration called for greater participation and representation of emerging markets and developing countries, including countries from Africa, Asia, Latin America and the Caribbean. It also addressed representation in the UN system and other international organizations.

The issue is particularly important because many developing countries have increased their contribution to global production, trade and population, while questions remain regarding their

representation in major decision-making institutions.

BRICS therefore functions as a collective diplomatic platform through which its members can articulate demands for institutional reform.

BRICS and the Global South:

The concept of the Global South occupies an important position in the contemporary BRICS discourse.

The Global South is not a politically homogeneous group. Its countries differ significantly in economic capacity, political institutions, strategic priorities and development experiences. Nevertheless, many developing countries share concerns regarding development financing, representation, technology access, trade opportunities and international institutional reform.

BRICS provides one platform through which these concerns can be articulated.

At the 2026 summit, India's Prime Minister argued that the Global South should have greater influence in international decision-making and described the objective as moving from being "rule-takers" toward "rule-shapers."

The New Delhi Declaration similarly called for greater participation of emerging markets and developing countries in global decision-making structures.

The significance of this development lies in the movement from representation as a diplomatic principle toward participation in rule-making processes.

BRICS and International Financial Governance:

Financial governance is one of the most important areas in which BRICS seeks greater institutional influence.

The New Development Bank, established in 2015, was created to finance infrastructure and sustainable-development projects. Academic research identifies the NDB as an institutional experiment designed partly in response to concerns about representation and governance in the established global financial architecture.

The NDB is significant because it provides an additional source of development finance. Its governance model also differs from traditional multilateral development institutions. Research has highlighted the equal voting shares of the five founding members as an important institutional feature.

The 2026 BRICS discussions further emphasized the role of the NDB and broader financial cooperation.

BRICS also addressed reform of the International Monetary Fund. The New Delhi Declaration reaffirmed the objective of meaningful quota and governance reform so that the representation of emerging and developing economies better reflects their positions in the world economy.

Thus, BRICS' approach combines two strategies:

1. Creating or strengthening alternative institutions; and

2. Seeking reform within existing institutions.

This dual strategy is important. It indicates that BRICS does not necessarily seek complete institutional separation from the existing global financial system.

Cross-Border Payments and Local Currencies:

Another emerging dimension of BRICS cooperation concerns international payments.

The 2026 New Delhi Declaration reported continued work by the BRICS Payment Task Force on cross-border payment mechanisms, including interoperability of payment and messaging systems and discussions concerning trade settlements and investments using local currencies. It also emphasized that there is no single approach applicable to all members and that national priorities should be respected.

This approach has several potential implications.

- First, more efficient cross-border payment arrangements could facilitate intra-BRICS trade.
- Second, payment cooperation could reduce transaction costs in some circumstances.
- Third, technological interoperability could contribute to greater financial connectivity.

However, payment cooperation should not automatically be interpreted as the creation of a unified BRICS currency. The 2026 declaration focuses on practical cooperation and local-currency settlement rather than announcing a single BRICS currency.

This distinction is important for academically accurate analysis.

Science, Technology and Innovation:

Technology represents another significant dimension of emerging multipolarity.

The 2026 declaration identified science, technology and innovation as important drivers of economic and social development. It referred to cooperation among BRICS scientific and technological working groups, research infrastructure, quantum technologies and research networks.

Digital governance has also become increasingly important.

BRICS cooperation addresses issues such as cybersecurity, data security, digital connectivity and responsible use of information and communication technologies. The declaration also discussed submarine cable infrastructure and cooperation on digital connectivity.

These initiatives demonstrate that contemporary multipolarity includes technological capacity.

Countries that possess advanced technological capabilities have greater influence over international standards, digital infrastructure and innovation ecosystems. Consequently, cooperation in technology can strengthen the collective capacity of emerging economies.

At the same time, technological cooperation requires substantial investment, research capacity, regulatory coordination and protection of intellectual property. These factors may limit the speed at which BRICS can convert declarations into practical outcomes.

BRICS and Sustainable Development:

Sustainable development has become a major area of BRICS cooperation.

The 2026 chair ship placed sustainability alongside resilience, innovation and cooperation. The New Delhi Declaration connected economic growth with social inclusion, environmental sustainability and resilience.

BRICS countries face common development challenges, including urbanization, infrastructure gaps, energy requirements, environmental pressures and unequal access to technology.

Cooperation in these areas can provide opportunities for:

- renewable-energy development;
- climate-resilient infrastructure;
- sustainable urbanization;
- water and sanitation;
- digital inclusion;
- scientific research;
- food and energy security.

The declaration also highlighted cooperation on resilient global value chains and broader participation of developing countries in higher-value-added segments of production.

This illustrates how economic multipolarity can be connected with development pol

BRICS Expansion: Opportunities and Challenges:

The expansion of BRICS has increased its geographical reach and broadened its political and economic representation. However, expansion also creates institutional challenges.

Greater Representation:

An expanded membership enables BRICS to include more regions and development experiences. It potentially strengthens its ability to articulate issues relevant to a wider range of developing countries.

Economic Diversity:

BRICS members have very different economic structures, levels of development and trade relationships. Such diversity can make the formulation of common economic policies difficult.

Political Diversity:

The members have different political systems and foreign-policy traditions. BRICS operates largely through consensus, which can make agreement possible but can also slow decision-making.

Strategic Differences:

Academic research has identified internal divergences as an important constraint on BRICS' capacity to transform global governance. Research on BRICS expansion argues that enlargement broadens the grouping's footprint while internal differences and continued dependence on existing global financial structures limit its transformative capacity.

Research has also highlighted differences between India and China as one factor shaping debates concerning BRICS' future direction.

These differences do not necessarily make cooperation impossible. Rather, they demonstrate that BRICS is better understood as a flexible platform for selective cooperation than as a traditional political or military alliance.

BRICS and the Changing Nature of International Relations:

BRICS 2026 demonstrates that international relations are increasingly shaped by several overlapping dimensions.

Political Dimension:

BRICS provides a forum for consultation among major emerging and developing countries.

Economic Dimension:

Trade, investment, development finance and global value chains form a major component of cooperation.

Financial Dimension:

The NDB, payment cooperation and discussions on international financial reform contribute to financial multipolarity.

Technological Dimension:

Scientific research, digital infrastructure, artificial intelligence-related discussions and technology cooperation represent emerging areas of influence.

Development Dimension:

BRICS increasingly connects global governance with sustainable and inclusive development.

Diplomatic Dimension:

The grouping gives members an additional platform through which they can coordinate positions in international institutions.

These dimensions suggest that multipolarity is not merely about the distribution of military power. It increasingly involves institutions, networks, markets, technologies and development partnerships.

Major Challenges Before BRICS:

Despite its growing importance, BRICS faces several challenges.

Maintaining Cohesion:

The larger the membership, the greater the possibility of divergent national interests. Maintaining consensus may become increasingly complex.

Institutionalization:

BRICS has developed many working groups and forums, but long-term institutional effectiveness requires continuity, resources, monitoring and implementation mechanisms.

The 2026 declaration itself recognized the need for enhanced coordination, continuity and long-term institutional development.

Economic Differences:

Members vary considerably in economic structure and development level. Common economic initiatives must therefore accommodate diverse national circumstances.

Geopolitical Differences:

BRICS members do not have identical views on international security and regional conflicts. These differences can complicate efforts to formulate unified political positions.

Relationship with Existing Institutions:

BRICS must balance its objective of reforming international institutions with its continuing participation in them.

From Declarations to Implementation:

One of the most important tests for BRICS will be whether summit commitments result in measurable institutional outcomes.

Declarations establish political priorities, but implementation requires funding, technical expertise, legal frameworks and sustained political commitment.

Major Findings:

The study identifies the following major findings:

1. **BRICS has evolved beyond its original economic identity.** It has become a broad platform covering political, economic, financial, technological and developmental cooperation.
2. **Multipolarity is multidimensional.** BRICS contributes to political, economic, financial, technological and institutional pluralism.
3. **BRICS 2026 emphasizes reform rather than simple institutional replacement.** The New Delhi Declaration supports both reform of existing institutions and development of new cooperation mechanisms.
4. **Global South representation is a central theme.** BRICS seeks greater participation of emerging and developing countries in international decision-making.
5. **The New Development Bank is an important institutional experiment.** Its role demonstrates that emerging economies can create multilateral development-finance mechanisms of their own.
6. **Technological cooperation is becoming increasingly important.** Science, innovation, digital connectivity and cybersecurity have become important components of BRICS cooperation.
7. **Expansion creates both opportunities and challenges.** Greater geographical representation can strengthen BRICS' reach, but internal diversity may complicate consensus and institutional coordination.
8. **The future significance of BRICS depends on implementation.** Its influence will depend not only on declarations but also on the capacity to develop practical, sustainable and measurable cooperation.

Conclusion:

BRICS 2026 represents an important stage in the evolution of a grouping that has progressively expanded its agenda, membership and institutional mechanisms. The New Delhi Summit demonstrated that BRICS is increasingly concerned with the structure of global governance as well as with economic and development cooperation.

The concept of multipolarity provides a useful framework for understanding this transformation. BRICS is contributing to a more distributed pattern of international cooperation through development finance, economic coordination, technological collaboration, diplomatic consultation and Global South representation.

The New Delhi Declaration is particularly significant because it combines support for multipolarity with continued emphasis on multilateralism and the central role of the United Nations. This indicates that BRICS' approach cannot be reduced to a simple attempt to replace existing international institutions.

Instead, BRICS is developing a layered approach to global governance. It participates in

existing institutions, advocates their reform and simultaneously creates additional institutions and networks for cooperation.

The New Development Bank illustrates this approach in the financial sphere. BRICS members have also pursued cooperation in payments, science and technology, sustainable development and global value chains. These initiatives provide additional channels through which emerging economies can strengthen their collective role.

At the same time, BRICS faces significant challenges. Its members possess different political systems, economic interests, strategic priorities and regional relationships. Expansion increases representativeness but also increases the complexity of consensus.

References:

1. Acharya, A. (2017). After liberal hegemony: The advent of a multiplex world order. *Ethics & International Affairs, 31*(3), 271–285.
2. Carvalho, G. de, Anand, J., & Naidu, S. (2025). BRICS expansion: Adaptive response or proactive restructuring of global governance? *South African Journal of International Affairs, 32*(1–2), 9–32.
3. Chin, G. T., & Kamal, R. D. (2024). Bangladesh and New Development Bank: Accession and after, money and more. *Global Policy, 15*(2), 414–426.
4. Hofman, B., &Srinivas, P. S. (2024). New Development Bank's role in the global financial architecture. *Global Policy, 15*(2), 451–457.
5. Kumar, D. (2025). BRICS expansion: China–India relations and contentions over its role. *Asian Affairs, 57*(1), 4–32.
6. Ministry of External Affairs, Government of India. (2025). *BRICS: Brief on BRICS*. Government of India.
7. Ng, J. (2024). The BRICS Plus challenge and emerging hierarchical multilateralism. *Global Governance: A Review of Multilateralism and International Organizations, 30*(2), 270–287.
8. Prime Minister's Office, Government of India. (2026). *BRICS New Delhi Declaration: Building for Resilience, Innovation, Cooperation and Sustainability*. Government of India.
9. Press Information Bureau, Government of India. (2026). *BRICS New Delhi Declaration: Building for Resilience, Innovation, Cooperation and Sustainability*. Government of India.
10. Press Information Bureau, Government of India. (2026). *Department of Youth Affairs to host BRICS Youth Council Meeting, Youth Summit and Youth Ministers' Meeting as part of India's BRICS Presidency 2026*. Government of India.
11. Press Information Bureau, Government of India. (2026). *English translation of Prime Minister's opening remarks during the 18th BRICS Summit*. Government of India.
12. Hofman, B., &Srinivas, P. S. (2024). New Development Bank's role in the global financial architecture. *Global Policy, 15*(2).

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Migration, Urban Growth and Politics in Bengaluru: Emerging Issues of Urban Governance and Political Inclusion

Dr. Sunanda. M. Madar
Associate Professor, Dept of Political Science,
GFGC Yaragatti, Karnataka, India.
Corresponding Author – Dr. Sunanda. M. Madar
DOI - 10.5281/zenodo.23059043

Abstract:

Bengaluru has emerged as one of India's major metropolitan centres and an important destination for internal migration. The city's expansion has been associated with employment opportunities, educational institutions, information technology, manufacturing, construction, trade, services and other forms of economic activity. Migration has consequently become an important component of Bengaluru's demographic and socio-economic transformation. At the same time, rapid population growth and spatial expansion have generated pressures relating to housing, transportation, water supply, sanitation, employment, public services and urban infrastructure. These developments also have important political consequences because migrants are not merely economic actors but participants in the social and political life of the city. This paper examines the relationship between migration, urban growth and politics in Bengaluru from the perspective of urban governance and political inclusion. The study is based primarily on secondary data, particularly Census of India 2011 migration datasets, together with books, research studies, government reports and relevant academic literature. The Census migration dataset for Karnataka provides information on migrants according to place of last residence, duration of residence and reasons such as employment, business, education, marriage, movement after birth, movement with household and other reasons. The official dataset separately identifies Bruhat Bangalore Urban Agglomeration and BBMP-related urban data. The paper argues that migration and urban growth have transformed the political and administrative challenges confronting Bengaluru. The effective inclusion of migrant populations therefore requires attention to housing, employment, public services, documentation, political participation, urban representation and access to municipal institutions.

Keywords: Migration, Urbanisation, Bengaluru, Urban Politics, Political Participation, Urban Governance, Migrants, Political Inclusion.

Introduction:

Migration is an important component of urban transformation. People move from one place to another for different economic, social, educational, family and personal reasons. In rapidly developing metropolitan areas, migration contributes to demographic diversification and provides labour for different sectors of the urban economy. At the same time, large-scale migration can increase demand for housing, transportation, education, health services, water, sanitation and other public facilities. Consequently, migration should not be understood only as a demographic process. It is also an economic, social and political process that influences patterns of resource distribution, urban governance and political participation.

Bengaluru occupies a particularly significant position in the study of migration and urban politics. The city has developed from a major administrative and commercial centre into a metropolitan economy with strong concentrations of information technology, biotechnology, manufacturing, construction, education, finance, retail, hospitality and professional services. Employment opportunities have attracted people

from different parts of Karnataka and from other states of India. Educational opportunities and the expansion of private and public institutions have also contributed to population mobility.

The growth of Bengaluru has produced considerable spatial transformation. Residential areas have expanded beyond the older urban core, while new employment centres, industrial areas, technology corridors and peripheral settlements have developed. The expansion of the urban region has created new relationships between the metropolitan core and surrounding areas. Migrant workers and households are present across formal and informal residential spaces, including rental housing, apartment complexes, worker settlements, peripheral colonies and informal settlements.

Migration also has implications for political participation. Migrants may participate in urban political life through voting, neighbourhood associations, trade unions, civil-society organisations, community organisations, resident welfare associations and informal networks. However, political participation can be influenced by residence duration, employment conditions, documentation, knowledge of local institutions, language, social networks and access to electoral registration. The political incorporation of migrants therefore constitutes an important dimension of urban citizenship.

The Census of India 2011 provides an important empirical foundation for studying this process. The official D-03 Urban Agglomeration dataset identifies migration according to place of last residence, duration of residence and reasons for migration. It includes categories such as work or employment, business, education, marriage, movement after birth, movement with household and other reasons. The dataset specifically includes Bruhat Bangalore Urban Agglomeration. The Census also provides a city-level migration dataset that identifies BBMP-related urban data and provides information on migrants by place of last residence and reason for migration. This paper therefore examines Bengaluru as a case of migration-driven urban transformation and analyses how demographic mobility interacts with urban development, political participation and governance.

Objectives of the Study:

The first objective of the study is to examine the relationship between migration and urban growth in Bengaluru. The second objective is to analyse the major economic and social factors responsible for migration to the city. The third objective is to examine the impact of migration on housing, employment, transportation and public services. The fourth objective is to analyse the political participation and political inclusion of migrant communities in Bengaluru. The fifth objective is to examine the challenges faced by urban governance institutions in responding to migration and rapid metropolitan expansion.

Methodology:

The study is based on secondary data and follows a descriptive and analytical research approach. The principal demographic source is the Census of India 2011, particularly migration tables relating to Karnataka, urban agglomerations and cities. The Census D-03 Urban Agglomeration dataset provides information about the place of last residence, duration of residence and reasons for migration and includes Bruhat Bangalore Urban Agglomeration as a geographical unit. The D-03 city-level dataset similarly provides migration information for cities in Karnataka and identifies the BBMP urban area within its geographical classification. Additional secondary materials include government reports, urban development documents, academic books, journal articles, research papers and studies relating to migration, urbanisation, governance and political participation. The study adopts a qualitative and interpretative approach to understand the political implications of demographic and spatial transformation. An important limitation is that Census 2011 remains the principal comprehensive population-census baseline for migration analysis used in this paper. Therefore,

the paper does not present Census 2011 figures as current 2026 population estimates. Instead, the Census data are used to establish the demographic and migration structure of Bengaluru during the 2011 census period.

Migration and Demographic Transformation in Bengaluru:

Migration has played an important role in Bengaluru's demographic transformation. The city has attracted people from different districts of Karnataka as well as from other states. The Census migration data classify migrants according to their place of last residence, duration of residence and reasons for movement. This allows researchers to examine both the geographical origins of migrants and the different motivations underlying migration. Migration has contributed to the increasing diversity of Bengaluru's population. People from northern Karnataka, southern Karnataka, coastal Karnataka and other regions have become part of the metropolitan labour force. Migrants from outside Karnataka have also become visible in sectors such as construction, manufacturing, hospitality, transportation, domestic work, retail and services.

Demographic diversification has contributed to changes in neighbourhoods, markets, workplaces and social institutions. New linguistic and cultural networks have developed alongside older communities. The resulting metropolitan environment is socially heterogeneous and increasingly interconnected.

Major Reasons for Migration:

Economic opportunity constitutes an important factor in migration to Bengaluru. Employment in information technology, manufacturing, construction, retail, transport, hospitality, domestic services and professional occupations attracts workers with different educational and occupational backgrounds. Education is another important factor. Bengaluru has numerous universities, colleges, technical institutions, professional institutions and private educational establishments. Students and their families therefore move to the city for educational purposes. Some students subsequently enter the urban labour market and establish long-term residence.

Marriage and family-related movement also constitute important dimensions of migration. Migration associated with marriage can particularly influence the geographical mobility of women. Movement after birth and movement with households represent additional forms of migration captured in the Census classification. The official Census dataset explicitly categorises migration according to work, business, education, marriage, movement after birth, movement with household and other reasons. The diversity of migration motivations demonstrates that migration cannot be reduced to labour mobility alone. It is simultaneously an economic, demographic and social process.

Migration and Employment:

The relationship between migration and employment is central to Bengaluru's urban economy. Migrants supply labour across a wide range of economic sectors. Highly educated migrants may enter information technology, engineering, finance, research and professional services, while other migrants may find employment in construction, domestic work, transport, security, hospitality, manufacturing and informal economic activities.

The labour market therefore contains significant differences among migrants. Some migrants possess formal contracts, higher salaries and social security benefits, while others work in informal occupations with limited employment protection. The economic contribution of migrant workers is consequently not reflected equally in their social and political status. Employment also affects political participation. Workers with unstable employment may have limited time and resources to engage in political activities. Migrants who frequently change residence or employment may

experience difficulties in maintaining continuous connections with local political institutions.

Migration, Housing and Urban Space:

Housing constitutes one of the major challenges associated with rapid urban growth. Migrants require affordable and accessible housing close to employment and transportation facilities. The high cost of formal housing can encourage low-income migrants to live in peripheral areas, informal settlements, shared accommodation or employer-linked housing. Residential segregation can influence political inclusion. People living in peripheral or informal settlements may have limited access to municipal information and institutional networks. Their political demands may also receive different levels of attention depending on their organisational capacity and relationship with local institutions. Housing therefore represents more than a physical requirement. It is closely associated with urban citizenship. Stable residence can provide individuals with stronger connections to neighbourhood institutions, while housing insecurity can weaken political participation.

Migration and Transportation:

Transportation is another important dimension of the relationship between migration and urban growth. The spatial expansion of Bengaluru has increased the distance between residential areas and employment centres for many workers. Long commuting times can impose financial and social costs on households. For migrant workers, access to affordable public transportation is particularly important. Employment opportunities may be concentrated in specific parts of the metropolitan region while affordable housing is located farther away. Transportation policy therefore affects the ability of migrants to access employment and public services. Transportation also has political significance because infrastructure development involves decisions about resource allocation, planning priorities and public investment. Citizens and migrant communities can therefore become involved in debates over roads, public transport, traffic management and urban mobility.

Migration and Public Services:

Rapid population growth places pressure on public services. Water supply, sanitation, healthcare, education, waste management and other services must respond to the needs of an expanding population. Migrants may experience difficulties accessing public services because of economic constraints, residential insecurity or lack of familiarity with administrative procedures. However, the degree of difficulty varies substantially between migrant groups. Middle-class and highly educated migrants may access private services, while low-income migrants may depend more heavily on public facilities. The provision of public services therefore has important implications for political legitimacy. When residents perceive inequalities in access to services, they may seek political representation, organise collectively or approach administrative institutions.

Migration and Political Participation:

Political participation is an important dimension of migrant integration into urban society. Migrants may participate in electoral politics, local associations, trade unions, community organisations, civil-society organisations and neighbourhood networks. However, migration can create practical barriers to political participation. Frequent movement between locations can make electoral registration and continuity of political participation more difficult. Migrants may also have limited knowledge of local political institutions and procedures.

Political participation is also influenced by social networks. Migrants who have established community connections may receive information about government schemes, elections and public services through informal networks. Such networks can facilitate political participation and collective action. At the same time, migrant political

participation should not be assumed to be uniform. The political behaviour of migrants varies according to occupation, education, income, duration of residence, gender, place of origin and relationship with local communities.

Migration and Electoral Politics:

Migration influences electoral politics by changing the social composition of urban constituencies. As populations grow and residential areas expand, political representatives must respond to increasingly diverse groups. Migrants may participate in elections when they are eligible and registered, but their political engagement may depend on their degree of residential stability and connection to the locality. Long-term migrants may develop stronger neighbourhood identities, while recent migrants may remain more connected to their places of origin.

Political parties and candidates operating in urban constituencies may consequently encounter electorates with diverse linguistic, occupational and regional backgrounds. This diversity can influence campaign communication, local political networks and issue priorities. Such developments should be examined empirically rather than assumed to produce a uniform migrant political preference.

Migration and Political Representation:

Political representation concerns more than voting. It involves the ability of different social groups to communicate their interests to decision-makers and influence public policy. Migrants may face difficulties in achieving effective representation when their residential communities are fragmented or when they lack strong institutional organisations. Informal workers and low-income migrants may have limited resources for sustained political mobilisation. Resident associations, workers' organisations, community organisations and civil-society groups can provide mechanisms through which migrant communities communicate their demands. These organisations may raise issues relating to housing, water, sanitation, transportation, employment and public safety.

Political representation therefore depends partly on the institutional channels available for expressing urban demands.

Migration and Urban Citizenship:

Urban citizenship refers to the practical ability of people living in cities to access rights, services, institutions and opportunities associated with urban life. It is particularly relevant to migration because people may live and work in a city without immediately developing strong institutional and political connections to it. The idea of urban citizenship highlights the difference between being physically present in a city and being fully integrated into its political and institutional life. Migrants may contribute significantly to the economy while facing difficulties in accessing housing, welfare services, political information and local decision-making mechanisms. The concept is therefore useful for examining whether Bengaluru's development has produced inclusive forms of urban citizenship.

Language and Identity Politics:

Bengaluru is characterised by linguistic and cultural diversity. Kannada occupies a central position in the state's linguistic and cultural life, while migrants from other parts of India contribute additional languages and cultural practices to the metropolitan environment. Language can become politically significant when questions of public communication, employment, education, signage, cultural recognition and social identity arise. Migrants may adapt to the local linguistic environment while maintaining connections with their languages and communities of origin. Language politics should therefore be examined within the broader context of metropolitan pluralism. Urban governance needs to communicate effectively with diverse populations while ensuring access to public institutions and services.

Informal Political Networks:

Informal political networks are particularly important in migrant communities. Migrants often rely on relatives, friends, co-workers, community associations and neighbourhood contacts to obtain information about employment, housing, government programmes and administrative procedures. These networks can become politically significant. They may facilitate mobilisation around local issues and provide channels for communicating demands to political representatives. Informal networks can therefore compensate to some extent for limited access to formal institutions.

However, dependence on informal networks can also create inequalities because individuals with stronger social connections may have better access to information and institutional resources.

Urban Governance and Institutional Challenges:

Migration presents complex challenges for urban governance. Municipal institutions must plan for population growth while responding to changing patterns of settlement and employment. Infrastructure development must consider both established residents and newly arrived populations. One major challenge is the mismatch between the pace of urban expansion and the development of infrastructure. Residential areas can expand rapidly while roads, drainage, water systems, public transportation and other facilities develop more slowly. Another challenge is coordination between different levels and institutions of government. Metropolitan governance involves multiple administrative agencies responsible for different aspects of urban development. Effective coordination is therefore essential for addressing problems associated with rapid population growth.

Migration also requires governance institutions to develop inclusive mechanisms for communication and participation. Migrants should be able to obtain information about public services and administrative procedures irrespective of their place of origin.

Social Inequality and Migrant Communities:

Migration does not produce identical outcomes for all migrants. Social and economic inequalities influence the opportunities available to different groups. Highly skilled migrants may benefit from employment opportunities in formal sectors and may have access to private housing, healthcare and education. Low-income migrants may depend more heavily on informal employment and affordable housing markets. Gender also influences migration experiences. Women migrants may experience different employment opportunities, mobility constraints and access to political institutions compared with men. Similarly, caste and class can influence occupational opportunities and access to housing and social networks.

The political implications of migration must therefore be analysed through an intersectional perspective that recognises differences among migrant communities.

Migration and the Informal Economy:

The informal economy is an important component of metropolitan employment. Migrant workers are present in construction, street vending, domestic work, small-scale manufacturing, hospitality, transportation and other informal occupations. Informal employment provides economic opportunities but can also involve unstable wages, limited social security and uncertain working conditions. These conditions influence political participation because workers with insecure employment may have limited time and resources to engage with formal institutions. Recognition of the informal economy is therefore important for urban governance. Policies relating to housing, transport, social security, public health and employment need to account for the realities of informal workers.

Migration and Political Mobilisation:

Migration can contribute to new forms of political mobilisation. Residents may organise around housing, transportation, water, sanitation,

employment and neighbourhood development. Such mobilisation can take place through formal organisations or informal community networks. Political mobilisation can also occur when migrant communities encounter common problems. Collective action may allow individuals to communicate demands that would otherwise remain fragmented. However, political mobilisation is shaped by local institutional conditions. The existence of accessible administrative mechanisms, civil-society organisations and representative institutions can influence whether grievances become organised political demands.

Migration and Urban Resource Competition:

Urban resources such as land, housing, water, transportation infrastructure and public services are limited relative to rapidly increasing demand. Migration can therefore intensify competition for access to resources. Resource competition should not automatically be interpreted as conflict between migrants and established residents. In many cases, both groups experience common problems created by inadequate infrastructure or unequal distribution of services. The political challenge is consequently to develop institutional mechanisms that distribute urban resources fairly and respond to the needs of different sections of the population.

Migration, Technology and Urban Politics:

Bengaluru's technological economy has also influenced political communication. Digital platforms allow residents to communicate about civic problems, public services and political issues. Migrants with access to digital technologies can use online networks to obtain information and participate in public discussions. Digital political participation, however, is not equally accessible to everyone. Differences in digital literacy, language, income and access to technology can produce new forms of inequality. Technology therefore creates both opportunities and challenges for urban political participation. Digital governance initiatives need to be complemented by accessible offline mechanisms for citizens and residents who face technological barriers.

Discussion:

The analysis demonstrates that migration and urban growth in Bengaluru are closely interconnected. Migration supplies labour and human capital, contributes to economic activity and increases cultural diversity. At the same time, population growth creates additional demands on urban infrastructure and governance institutions.

The political consequences of migration are particularly significant. Migrants are part of the city's economic and social life, but their degree of political inclusion can vary. Factors such as residence stability, employment, education, income, documentation, social networks and institutional accessibility influence participation.

The Census framework is valuable because it allows migration to be examined through multiple dimensions. The official D-03 Urban Agglomeration data distinguish different durations of residence and reasons for migration and identify the geographical origins of migrants. The city-level Census dataset similarly permits analysis of migration within the urban context of Karnataka and identifies the BBMP urban area within its classification.

The evidence therefore supports a broader understanding of migration as a political phenomenon. Urban migration changes not only the size of the population but also the social composition of political constituencies, the demand for public services and the nature of urban governance.

Major Findings:

The study finds that migration is an important component of Bengaluru's urban transformation. Economic opportunity, employment, education, marriage and family-related movement contribute to the city's migrant population. The official Census classification itself

demonstrates the diversity of migration motivations by distinguishing employment, business, education, marriage, movement after birth, movement with household and other reasons.

The study also finds that migration has contributed to the diversification of Bengaluru's population and labour market. Migrants participate in both formal and informal economic activities and contribute to the functioning of different sectors of the metropolitan economy.

Rapid urban growth has simultaneously increased demand for housing, transportation, water, sanitation, education, healthcare and other public services. These demands create continuing challenges for urban governance institutions.

The study further finds that migrant political participation is influenced by social and economic conditions. Residence stability, employment, education, income, social networks and access to information can affect political engagement.

Another finding is that migrant political inclusion cannot be understood only through electoral participation. Access to public institutions, representation, civic organisations and urban decision-making is equally important.

Finally, the study finds that inclusive urban governance requires institutions to recognise the diversity of Bengaluru's population and create accessible mechanisms for participation and service delivery.

Suggestions:

Urban planning should incorporate migration as an important component of metropolitan development. Population growth projections and migration patterns should be considered when planning housing, transportation, water supply, sanitation, healthcare and educational infrastructure.

Affordable housing should receive greater attention because housing insecurity can affect migrants' economic and political integration. Urban housing policies should consider the needs of workers in both formal and informal occupations.

Public transportation should be expanded and integrated with residential and employment patterns. Affordable and accessible transportation can improve employment opportunities and reduce the disadvantages associated with peripheral residence.

Urban institutions should strengthen mechanisms for communicating information about public services, government programmes and civic procedures. Information should be made accessible to diverse linguistic and socio-economic groups.

Political participation can be strengthened through greater civic awareness and accessible local-level engagement mechanisms. Community organisations, civil-society groups and resident associations can contribute to communication between residents and public institutions.

The concerns of informal workers should be incorporated into urban policy. Migrant workers in construction, domestic work, street vending, hospitality, transport and other informal sectors should be considered in social protection and urban development planning.

Finally, metropolitan governance should promote coordination among institutions responsible for different aspects of urban development. Migration is a cross-sectoral issue and therefore requires coordinated rather than fragmented policy responses.

Conclusion:

Migration and urban growth have become fundamental characteristics of Bengaluru's metropolitan transformation. The city's economic development has attracted people from different regions, occupations and social backgrounds. Migration has contributed to the labour force, economic activity, educational environment and cultural diversity of the city. At the same time, rapid urban expansion has created significant challenges. Housing shortages, transportation pressures, unequal access to public services, informal

employment and spatial inequalities demonstrate that demographic growth must be accompanied by inclusive urban planning. The political dimension of migration is particularly important. Migrants are not simply temporary economic participants; many establish long-term relationships with the city and become part of its social and institutional life. Their access to political participation, public services and decision-making therefore forms an important component of urban citizenship.

The study concludes that Bengaluru's future urban governance requires an integrated approach that connects migration, economic development, social inclusion and political participation. The Census of India 2011 provides a strong empirical foundation for understanding the migration structure of Bengaluru, particularly through data on place of last residence, duration of residence and reasons for migration. Future research can build upon this foundation through household surveys, ward-level studies and contemporary administrative data to examine how migration and political participation have evolved after 2011.

References:

1. Castells, M. (1983). *The city and the grassroots: A cross-cultural theory of urban social movements*. University of California Press.
2. Castles, S., de Haas, H., & Miller, M. J. (2014). *The age of migration: International population movements in the modern world* (5th ed.). Palgrave Macmillan.
3. Census of India. (2011). *D-03: Migrants by place of last residence, duration of residence and reasons for migration, Karnataka*. Office of the Registrar General & Census Commissioner, India.
4. Census of India. (2011). *D-03 Cities: Migrants from cities by place of last residence, duration of residence and reasons for migration, Karnataka*. Office of the Registrar General & Census Commissioner, India.
5. Census of India. (2011). *D-03 UA: Migrants from urban agglomerations by place of last residence, duration of residence and reasons for migration, Karnataka*. Office of the Registrar General & Census Commissioner, India.
6. Government of India. (2011). *Census of India 2011*. Office of the Registrar General & Census Commissioner, Ministry of Home Affairs.
7. Harris, J. R., & Todaro, M. P. (1970). Migration, unemployment and development: A two-sector analysis. *American Economic Review, 60*(1), 126–142.
8. Lee, E. S. (1966). A theory of migration. *Demography, 3*(1), 47–57.
9. Lefebvre, H. (1996). *Writings on cities*. Blackwell.
10. Ravenstein, E. G. (1885). The laws of migration. *Journal of the Statistical Society of London, 48*(2), 167–235.
11. Ravenstein, E. G. (1889). The laws of migration. *Journal of the Royal Statistical Society, 52*(2), 241–305.
12. Sassen, S. (2001). *The global city: New York, London, Tokyo* (2nd ed.). Princeton University Press.
13. Tacoli, C., McGranahan, G., & Satterthwaite, D. (2015). *Urbanisation, rural–urban migration and urban poverty*. International Institute for Environment and Development.
14. Todaro, M. P. (1969). A model of labor migration and urban unemployment in less-developed countries. *American Economic Review, 59*(1), 138–148.
15. United Nations. (2018). *World urbanization prospects: The 2018 revision*. Department of Economic and Social Affairs, Population Division.
16. World Bank. (2013). *Planning, connecting, and financing cities—Now: Priorities for city leaders*. World Bank.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Media and Political Polarization in India

Dr. Vidyashree Kolkar
Assistant Professor of Political Science,
Government First Grade College Kokatanur, Athani, Dist. Belagavi, Karnataka.
Corresponding Author – Dr. Vidyashree Kolkar
DOI - 10.5281/zenodo.23059056

Abstract:

This paper explores the connection between media systems and political polarization in India today. Over the last thirty years, India's media landscape has transformed from a state-monopolized television network to a thriving, multi-platform ecosystem that includes omnipresent digital platforms like YouTube and Whatsapp, high-decibel cable news networks, and print publications. This media development has made it easier for millions of people to access information and to participate in politics, but it has also made it easier for the population to become deeply divided along ideological and emotional lines. This paper explains the fundamentals of media and polarization in the Indian context, discusses the structural reasons behind sensationalist journalism, and evaluates the consequent effects on societal togetherness, press freedom, and democratic institutions. The article concludes by considering policy interventions that might help reduce ideological division while retaining democratic norms, including media ownership transparency, platform regulation, and online literacy.

Keywords: Media, Polarization, Digital, Social Media, Mainstream Media, Policy.

Introduction:

India is one of the most diverse democracies in the world with a complex web of linguistic, religious, regional and caste identities. In the past, mass media was used as a tool for nation-building after independence to educate the masses, promote civil engagement under government supervision, and to fix communal differences. But the economic liberalization of the early 1990s brought about a structural change in the Indian communications landscape. Over the past few years, the advent of private cable TV and the rapid spread of cheap mobile internet have dramatically changed the production, dissemination and consumption of political information. Political polarization is the term used to describe the increasing ideological divide and affective hatred that define political discourse in contemporary India. Large sections of the modern Indian media have played an active role in deepening these political cleavages rather than performing the role of an impartial 'Fourth Estate' checking the powers that be. Social media tools speed the dissemination of hyper-partisan content, identity-based narratives and misinformation, while prime-time news programs frequently reduce complex socio-political issues to noisy dichotomies. Hence, an understanding of the nexus between media systems and political polarization is required to assess the state of democratic governance in India today and in the future.

Objectives:

1. To define and explain the terms "media" and "political polarization" within the framework of India's socio-political environment.
2. To assess the impact of media-induced polarization on civic trust, public debate, democratic Institutions and social harmony.

3. To provide practical legislative solutions and civil society initiatives that seek to promote a fair, responsible and depolarized public arena.

Meaning of Media:

In classical political theory, media refers to the means, platforms and organizations that publish news, information and ideas to a large audience. It includes modern digital networks such as social media platforms, instant messaging applications and independent digital news portals, as well as more traditional media such as radio, broadcast television, newspapers and magazines. In democracies, the media is an important public space. Its primary role is to provide residents with the relevant, timely, and accurate information they need to engage in well-informed self-governance. Particular problems, events and policy discussions are highlighted to direct public attention and political priority. It must act as a watchdog, monitoring the behavior of corporations, government agencies, and powerful individuals in society, to ensure accountability and transparency. India's media is a hybrid system with traditional forms of media – print and broadcast – continuing to grow along with the rapid growth of digital media, giving it an exceptionally wide and diverse reach.

Meaning of Polarization:

Political polarization is the method by which political views, social groups and ideological attitudes move from a moderate center to opposing, often uncompromising, poles. Political polarization is generally split into two different dimensions in scholarly literature first one is Ideological polarization i.e. the growing gap between citizens or political parties on particular economic models, governance strategies or policy issues. Second one is Affective polarization- The extent to which people actively distrust, dislike and feel animosity toward rival political groupings, rather than just viewing them as opponents with different points of view.

The Decline of Freedom of the Press in India: Historical Shifts and Contemporary Crises:

Today's media ecosystem in India is undergoing a deep institutional crisis, as reflected in its falling rankings in global assessments. India fell to 157th position among 180 countries in the World Press Freedom Index issued by Reporters without Borders (RSF), a visible slip from the earlier positions. The country's downward trajectory is evident across political, economic, legal, social and security indicators, highlighting the growing gap between constitutional guaranties of free speech and ground-level realities. This drop occurs in a broader global environment in which the average press freedom score is at historic lows and more than half the world's nations are in critical categories now.

The independence movement was greatly influenced by journalism. Newspapers, print Medias, and early airing channels were powerful social actors that brought together citizens across the country, providing a vital voice to millions suppressed under colonial rule. But the post-independence period brought multifaceted problems concerning national security, regional integrity, and economic rehabilitation. In the 1950s and 1960s, the nascent democratic government aimed to bring stability to the country, and mainstream journalism generally supported this nation-building effort. Media institutions, rather than being adversarial watchdogs or highlighting administrative drawbacks, generally supported state policies, focusing mainly on developmental opportunities and national development.

This historic bias of the Indian media toward power has today become an ingrained weakness. The modern landscape is limited by monopolized corporate ownership, the heavy reliance on advertising, and opens political affiliations. At the same time, the rise of violence against journalists, coupled with targeted court battles and online harassment, has stifled independent journalism. With profits and prejudiced agendas driving media giants, the press's vital role as a watchdog is undermined. This divergence of

political pressure, financial centralization and rising hostility is the reason behind India's ongoing decline in global press freedom rankings – a matter of serious concern for the future of democratic debate.

The Shifting Paradigm of Indian Media: Independent Journalism vs Mainstream Corporate Structures:

The present-day Indian media terrain is passing through a significant structural change, driven by increasing disenchantment with inheritance institutions and the exponential growth of digital platforms. Historically, the mainstream Indian media, including the big television channels and print media, was imagined as an important democratic institution. However, a systemic shift has occurred, where profit-driven motives and corporate monopolies often dominate societal duties. The predominance of traditional demographic groups in the newsrooms and the heavy dependence on corporate sponsorships and government advertising have produced a clear pro-establishment bias. This results in the sidelining of important socio-economic issues and audiences are seen as consumers, not active citizens. That kind of commercialization threatens media pluralism and endangers democratic accountability.

Today, many reporters with limited resources are broadcasting local news live on mobile phones. This is drawing attention to local poverty, social crises and corruption. In addition, by using regional languages, independent reporters are giving voice to grassroots social movements. Independent creators have democratized the production and dissemination of information by overcoming the institutional bottlenecks of legacy media, promoting greater regional representation and inclusivity across India.

This movement toward alternative media has been spurred by the rapid decline in public trust of traditional news outlets. Traditional channels are often criticized for hyperbole, hyper-partisanship, and staged debates designed to chase TRP ratings. Individual content creators and longer-form YouTube podcasts are especially attracting younger audiences. These other formats remove the fake urgency of "breaking news" theater, and instead offer deep, unedited, conversational analyzes of complex geopolitical and economic events. Independent digital newsrooms, which use crowd-funded or subscription-based monetization models, are able to avoid editorial constraints and self-censorship that undermine corporate-backed networks.

Social media platforms like YouTube, Facebook, Instagram, LinkedIn and WhatsApp have transformed political communication. These digital spaces offer political actors and parties the opportunity to bypass traditional gatekeepers and to connect directly with citizens across the country at a fraction of the cost and with a much wider reach. Ultimately, the growth of independent creators and digital newsrooms in India marks an important recalibration of the public sphere. Outperforming the mainstream media in trust, editorial freedom and linguistic diversity, independent journalism is redefining how citizens consume news and engage with democracy in the digital era.

Reasons for Media-Fueled Polarization in India:

The relationship between media and political polarization in India is not incidental; it is driven by structural, economic and technological factors across television and digital domains. There are so many things that drive political polarization. We will discuss some of these here.

The Political Economy of Cable TV:

In India, with the rise of 24-hour cable news channels, there was stiff commercial competition. Target Rating Points (TRPs) are critical to media companies' financial survival as they determine advertising income. This funding model is a big incentive for broadcasters to create content that is high arousal and low cost. The studio-anchored prime-time debates have largely replaced the investigative journalism and the field reporting.

Such shows usually involve sensationalized graphics, political panellists and violent confrontation. Television networks use drama, not sophisticated analysis, to present complex socio-economic arguments as moral or nationalistic dichotomies to maximize viewer retention. In addition, editorial freedom can be compromised by dependence on government advertising revenue and by ownership by multinational corporations with multiple commercial interests, which would reinforce political narratives that are consistent with each other.

Digital Networks and Algorithmic Amplification:

The explosive rise of cheap mobile data meant that millions of new internet users in India could now access digital platforms. Social media algorithms are built to maximize engagement, meaning content that triggers strong emotions, especially anger, surprise, and moral outrage, is inherently favored. This means that more provocative or politicized posts are shared more organically than neutral or nuanced posts. In India, the role of closed, end-to-end encrypted messaging services such as WhatsApp is equally important. These platforms, which are the primary news source for large segments of the population, provide a means to spread emotionally charged rumours, hyper biased statements and unsubstantiated claims directly within trusted personal networks, creating persistent echo chambers that are hard to monitor or fact check independently.

Polarization and Impact of Media on Indian Politics and Society:

Deterioration of Social Harmony & Inter Communal Trust:

Regular emphasis on identity conflicts in media and internet networks leads to a decline in social cohesion. Rival groups or political groups are often depicted in hyper partisan narratives as existential threats to the country. It is this framing that exacerbates social divisions by turning ordinary civic interactions into battlegrounds, and making people more vulnerable to localized disputes triggered by internet rumors.

The Fragmentation of Common Reality:

Democracy requires a basic consensus on essentials to function. Media polarization leads to parallel informational realities. The same event is described in completely different ways by citizens who use different news sources or are part of different social media networks. This fragmentation makes productive public discourse all but impossible, because opposing parties no longer share a common baseline of facts.

Misrepresenting the Political Agenda:

The predominance of outrage-driven media changes political incentives. Often, political actors are incentivized to pursue loud media narratives rather than economic development, healthcare infrastructure, educational reform and job creation. The making of long-term policy is subordinate to issues which excite strong emotions.

Decline of Institutional Compromise:

Deep affective polarization impacts parliamentary culture and governance. When political parties view their opponents as hostile or illegitimate, there is far less room for cross-party agreement, productive legislative discussion, and parliamentary compromise. As governance becomes more adversarial, it breeds legislative conflict and public distrust of democratic processes. Threats to the Integrity of Journalism and Freedom of the Press:

Independent journalism is under systematic pressure as media organizations are aligning with specific political groups. Journalists who attempt to investigate powerful interests critically may find themselves facing commercial boycotts, legal challenges, or harassment on the internet. The atmosphere fosters self-censorship, and inhibits the media from fulfilling its democratic watchdog role effectively.

Solutions to issues that come up from media-driven polarization:

Structural, regulatory and educational measures are needed to address the challenges of

media-driven polarization in India that balance the protection of free expression and public accountability. Strengthening media governance and ownership transparency:

Cross-Media Ownership Regulations are required. Introduction of clear rules to ensure a variety of independent views and prevent the excessive concentration of media ownership in some markets. There should be clear disclosures about corporate ownership relationships, government advertising revenue and media financing sources to avoid unreported conflicts of interest.

Algorithmic Reform and Accountability of Digital Platforms:

Digital platforms should be incentivized to audit engagement algorithms to mitigate the automatic amplification of harmful disinformation and hate speech. Accountability for Viral Misinformation: Clear methods for digital platforms to track trends of viral, unencrypted misinformation without jeopardizing appropriate user privacy.

Promoting Independent Fact-Checking and Media Literacy:

One way to reduce the polarization is curriculum integration. Full media literacy programs in schools and universities that teach students how to identify cognitive bias, check sources, and critically evaluate news. Support for Independent Fact-Checking: To counter unsubstantiated narratives in regional languages, independent, nonpartisan fact-checking organizations must be strengthened.

Conclusion:

Media and political polarization is one of the main challenges for Indian democracy in the twenty-first century. As the public sphere has become increasingly fragmented, so too has public access to political information, as the broadcast paradigm has shifted from a state-dominated model to one that is highly competitive and algorithmically driven. Sometimes, the modern media ecosystem encourages partisan divide over objective reporting. Business pressures for ratings and digital platform designs that monetize controversy can create this dynamic. The resultant polarization affects the Indian society by degrading interpersonal trust, demolishing shared reality and deflecting political discourse away from urgent socioeconomic issues to identity-based conflicts. To protect India's democratic fabric, there has to be a partnership between policymakers, media organizations, internet companies and civil society. Structural transparency, independent journalism, platform accountability and online literacy can help create a fair and responsible media environment which serves as a bridge to positive public conversation rather than a catalyst to divide.

References

1. Biyani Colleges. (n.d.). The relationship between media and political power in India.
2. Boston University. (2025, April 18). Media and democracy in India: How media repression is linked to polarization. Democratic Erosion.
3. CS Academy. (n.d.). Political polarisation. Latest Blog.
4. Ferrari, A. L. (2020, November 25). India's polarized society and the role of religion. V-Dem Institute.
5. Goethe-Institut. (n.d.). India's new news economy: Where journalists publish without any gatekeepers – The changing face of independent journalism in India.
6. Hapani, N. (n.d.). A short history of political polarisation in India from the 1800s to the 2020s. Reflections Live.
7. Jeffrey, R. (2010). India's newspaper revolution: Capitalism, politics and the Indian-language press. Oxford University Press.
8. Neyazi, T. A. (2026). Social media and political polarisation in India [Manuscript submitted for publication].
9. NITI Aayog. (n.d.). Deciphering World Press Freedom Index. Government of India.

10. Rajagopal, A. (2001). Politics after television: Hindu nationalism and the reshaping of the public in India. Duke University Press.
11. Reporters Without Borders (RSF). (2026). World Press Freedom Index: India country profile.
12. Singh, O. N., & Gupta, N. (2026, June 4). What India's latest press freedom ranking reveals about its democratic trajectory. The Diplomat.
13. Sudan, K. S. (2026). Social media and political polarization in India: Mechanisms, evidence, and policy responses [Unpublished manuscript].
14. Thussu, D. K. (2020). India: M*edia and globalization*. SAGE Publications.
15. Verma, R. (2022). Algorithmic amplification and affective polarisation in South Asian democracies. *Journal of Asian Communication Studies*, 14(2), 112–130.

International Journal of Advance and Applied Research
www.ijaar.co.in
ISSN – 2347-7075 Impact Factor – 8.141
Peer Reviewed Bi-Monthly
Vol. 7 No. 50 September - October - 2026

Open Access E-Resources and Scholarly Communication: Transforming Academic Libraries and Research in India

Amrut S. Hugar
Librarian,
K.L.E. S.V.S. Bellubbi Arts and commerce College, Saundatti, Karnataka, India
Corresponding Author – Amrut S. Hugar
DOI - 10.5281/zenodo.23059073

Abstract:

The rapid development of Information and Communication Technology (ICT) has transformed the creation, organization, dissemination and use of scholarly information. Academic libraries, which traditionally depended on printed books and journals, are increasingly becoming digital information centres providing access to electronic resources, online databases, institutional repositories and open access scholarly literature. Open Access (OA) has emerged as an important model for improving the accessibility, visibility and dissemination of scholarly research. It enables researchers, teachers, students and the wider public to access scholarly literature without conventional subscription barriers.

The development of open access e-resources has also influenced scholarly communication by changing the relationships among authors, researchers, publishers, libraries and readers. Institutional repositories, open access journals, electronic theses and dissertations, preprints and digital scholarly platforms have created new channels for the production and dissemination of knowledge. In India, initiatives such as e-ShodhSindhu, N-LIST, Shodhganga, ShodhGangotri, institutional repositories and other digital library programmes have contributed significantly to the accessibility of scholarly information. INFLIBNET describes open access journals and institutional repositories as two important routes of open access publishing, commonly associated with the "gold" and "green" routes respectively.

This paper examines the concept and importance of open access e-resources, their role in scholarly communication, major open access initiatives in India, benefits and challenges, and the changing role of academic libraries and librarians. The paper also suggests strategies for strengthening open access awareness, digital literacy, institutional repositories, copyright literacy and responsible scholarly communication among students, faculty and researchers.

Keywords: Open Access, E-Resources, Scholarly Communication, Academic Libraries, Institutional Repository, e-ShodhSindhu, N-LIST, Shodhganga, Digital Library, Research Communication.

Introduction:

Information is one of the most important resources for education, research and social development. Universities and colleges depend upon scholarly information for teaching, learning and research. Traditionally, academic information was communicated mainly through printed books, journals, conference proceedings, theses, reports and other physical documents. However, the emergence of computers, the Internet and digital technologies has significantly changed the scholarly information environment.

The modern academic library is no longer limited to the collection and preservation of printed documents. It has become an important gateway to electronic information. E-books, e-journals, online databases, institutional repositories, digital libraries, electronic theses and dissertations and open educational resources have expanded the scope of library services.

One of the most important developments in this environment is **Open Access (OA)**. The Budapest Open Access Initiative of 2002 provided an influential definition of open access as the free availability of scholarly literature on the public Internet, with permissions that allow users to read, download, copy, distribute, search and link to the full text, subject to appropriate conditions.

Open access has therefore changed the traditional model of scholarly communication. Instead of research remaining accessible primarily through institutions able to pay subscription charges, open access seeks to make research more widely available.

For developing countries such as India, open access can be particularly significant because it can help reduce information barriers and provide researchers and students with wider access to scholarly knowledge.

UNESCO's 2021 Recommendation on Open Science further places open access within the broader concept of open science. UNESCO describes open science as making scientific knowledge more accessible, inclusive and reusable and identifies open access to scientific publications, data and educational resources as important components. (UNESCO)

Concept of Open Access:

Open Access means making scholarly information freely accessible to users through digital networks, particularly the Internet, while respecting copyright and licensing conditions.

Open access should not simply be understood as "free information." Authentic open access also involves clearly defined rights for users. The Directory of Open Access Journals (DOAJ), for example, emphasizes open licensing and immediate free access, allowing lawful activities such as reading, downloading, copying, distributing and linking to scholarly articles. Thus, open access has two important dimensions:

1. **Free or barrier-free access to scholarly information**
2. **Clearly defined rights for lawful use and reuse**

Open access supports the principle that scholarly research should reach the widest possible audience.

Open Access and Scholarly Communication:

Scholarly communication refers to the processes through which researchers create, evaluate, publish, disseminate, preserve and use scholarly knowledge.

The traditional scholarly communication cycle can be represented as:

Research → Writing → Peer Review → Publication → Library Subscription → Reader

The digital and open-access environment has expanded this model:

Research → Preprint/Repository → Peer Review → Open Publication → Indexing → Digital Discovery → Reuse → Further Research

The change has created new opportunities for researchers and libraries.

Open access can:

- increase the visibility of research;
- improve accessibility to scholarly literature;
- support interdisciplinary research;
- facilitate knowledge sharing;
- improve the dissemination of institutional research;
- support lifelong learning;
- help researchers discover relevant literature;
- strengthen collaboration among institutions;
- preserve scholarly output through digital repositories.

The Budapest Open Access Initiative identified two major strategies for achieving open access: repositories and open access journals, commonly referred to as the **green** and **gold** routes.

Types / Routes of Open Access:

1. Gold Open Access:

Gold Open Access refers to scholarly articles made openly available through an open access journal.

In this model, the article is accessible online without the reader having to pay a subscription fee.

Some open access journals may use article processing charges (APCs), while others operate without charging authors. Therefore, "open access" should not automatically be equated with "author pays."

DOAJ provides a major international directory of quality peer-reviewed open access journals and aims to increase the visibility and accessibility of open scholarly research.

2. Green Open Access:

Green Open Access involves depositing a version of a research paper in an institutional or subject repository.

Examples may include:

- accepted manuscripts;
- preprints;
- postprints where permitted;
- theses and dissertations;
- conference papers;
- institutional research publications.

Institutional repositories are therefore an important responsibility and opportunity for academic libraries.

INFLIBNET identifies institutional repositories as a major route of open access and lists initiatives such as Shodhganga, ShodhGangotri and IR@INFLIBNET among Indian open-access initiatives.

3. Hybrid Open Access:

Hybrid publishing occurs when a subscription journal makes selected articles openly accessible, generally through an additional publishing arrangement.

4. Diamond/Platinum Open Access:

Diamond or Platinum Open Access refers to journals where readers have free access and authors generally do not pay article processing charges. Such models may be supported by universities, scholarly societies, institutions, libraries or public funding.

Major Open Access E-Resources and Initiatives in India:

India has developed several important national-level digital scholarly information initiatives.

1. e-ShodhSindhu:

e-ShodhSindhu is an important higher-education e-resource consortium associated with the Ministry of Education and implemented through INFLIBNET.

It provides access to scholarly electronic resources for eligible higher education institutions. INFLIBNET currently describes e-ShodhSindhu as a major programme providing access to thousands of full-text journals, e-books and databases The consortium helps institutions obtain scholarly resources through negotiated arrangements and enables students, teachers and researchers to access academic information.

2. N-LIST:

The **National Library and Information Services Infrastructure for Scholarly Content (N-LIST)** is the college component of e-ShodhSindhu.

N-LIST provides eligible colleges with access to electronic scholarly resources. INFLIBNET states that N-LIST provides access to thousands of electronic journals and e-books for eligible colleges.

For college libraries, N-LIST is particularly important because it supplements local library collections and enables users to access scholarly resources beyond the physical holdings of the institution.

3. Shodhganga:

Shodhganga is one of India's major repositories for electronic theses and dissertations.

It provides a platform for research scholars to deposit their Ph.D. theses and make them available to the scholarly community through open access. The repository supports the capture, indexing, storage, dissemination and preservation of electronic theses and dissertations.

Shodhganga has considerable importance for Indian research because researchers can use previously completed theses for:

- literature reviews;
- identification of research gaps;
- methodological understanding;
- avoiding duplication of research;
- identifying emerging research areas;
- comparative studies.

4. ShodhGangotri:

ShodhGangotri provides access to research synopses and helps reveal research trends and directions in Indian universities. It can also help researchers identify existing work and reduce unnecessary duplication.

INFLIBNET notes that ShodhGangotri's approved research synopses can subsequently be mapped to full-text theses in Shodhganga.

5. Institutional Repositories:

An institutional repository is a digital platform established by an institution to collect, preserve and disseminate its scholarly output.

A college or university repository may contain:

- faculty publications;
- research papers;
- conference papers;
- theses;
- dissertations;
- project reports;
- institutional publications;
- question papers;
- teaching materials;
- newsletters;
- annual reports;
- other scholarly and institutional documents.

Institutional repositories strengthen the visibility of an institution's intellectual output.

6. Directory of Open Access Journals (DOAJ):

DOAJ is an important international resource for discovering peer-reviewed open access journals and articles. Its mission includes improving the visibility, accessibility and use of quality open access scholarly research.

Researchers should use recognized directories such as DOAJ while selecting appropriate open access journals.

Role of Open Access E-Resources in Research:

Open Access e-resources provide researchers, teachers and students with wider and faster access to scholarly information. E-journals, e-books, theses, dissertations and research papers support literature review, interdisciplinary research and academic learning. They also reduce information barriers and increase the visibility and dissemination of research.

Changing Role of Librarians:

The role of librarians has changed from managing print collections to providing digital and research support services. Librarians help users identify reliable e-resources, search databases, use institutional repositories, manage references and understand copyright and plagiarism. They also support researchers in scholarly publishing and information literacy.

Open Access and Copyright:

Open access does not mean that all online information can be freely copied or reused. Researchers must understand copyright, publisher policies and open licences such as Creative Commons. Proper attribution and responsible use of scholarly information are essential. Libraries can create awareness about copyright and author rights.

Open Access and Research Ethics:

Ethical use of information is essential in scholarly communication. Researchers should avoid plagiarism, provide proper citations, respect copyright and present research findings honestly. Libraries can conduct programmes on research ethics, plagiarism, citation practices and responsible publishing.

Predatory Publishing:

The growth of open access has also increased concerns about predatory journals. Researchers should carefully check peer-review practices, editorial boards, indexing claims, publication charges and journal policies before submitting papers. Librarians can guide researchers in identifying credible journals and avoiding deceptive publishing practices.

Challenges of Open Access E-Resources:

Major challenges include the digital divide, lack of awareness, inadequate digital literacy, information overload, copyright issues, quality concerns and digital preservation. Limited access to reliable Internet facilities can also affect the effective use of e-resources. Proper training and institutional support are therefore necessary.

Role of College Libraries:

College libraries can promote Open Access through awareness programmes, user orientation, digital-literacy training and research-support services. Librarians can introduce students and faculty to e-ShodhSindhu, N-LIST, Shodhganga, DOAJ and institutional repositories. Libraries can also support literature searching, citation management and responsible scholarly publishing.

Important Open Access Resources:

Important resources for academic users include e-ShodhSindhu, N-LIST, Shodhganga, ShodhGangotri, DOAJ, institutional repositories and open educational resources. These resources provide access to journals, books, theses, dissertations and other scholarly materials and support teaching, learning and research.

Open Scholarly Communication Model:

An effective model of open scholarly communication can be based on five stages: **Awareness → Discovery → Evaluation → Dissemination → Preservation**. Libraries can guide users through these stages by creating awareness, helping them discover and evaluate reliable resources, supporting legitimate dissemination of research and preserving institutional scholarly output.

Findings:

Based on the review of literature and major open-access initiatives, the following findings can be identified:

1. Open access has significantly changed the traditional scholarly communication environment.
2. Open access e-resources provide opportunities for wider dissemination of scholarly information.
3. Institutional repositories are important mechanisms for preserving and disseminating research output.
4. Indian initiatives such as e-ShodhSindhu, N-LIST and Shodhganga have strengthened access to scholarly information.
5. College libraries have an important role in promoting awareness and effective use of digital scholarly resources.
6. Researchers require training in information literacy, copyright, licensing and responsible scholarly publishing.
7. Open access does not eliminate the need for quality assessment; users must evaluate the reliability and scholarly credibility of resources.
8. Predatory publishing and misleading journal practices create new challenges for researchers.
9. Copyright and licensing awareness are essential components of responsible open scholarly communication.
10. The future of academic libraries will increasingly depend on their ability to support digital scholarship, open science and research communication.

Suggestions:

The following suggestions may help strengthen open access and scholarly communication in Indian higher education institutions:

1. Strengthen Open Access Awareness: Colleges and universities should organize regular workshops on open access resources.

2. Improve Information Literacy: Students and researchers should be trained to search, evaluate and use digital scholarly information effectively.

3. Encourage Institutional Repositories: Higher education institutions should establish and maintain repositories for appropriate institutional scholarly output.

4. Promote Shodhganga: Research scholars should be encouraged to understand the importance of depositing eligible theses and dissertations through appropriate institutional procedures.

5. Develop Copyright Awareness: Libraries should provide guidance on copyright, author rights and Creative Commons licensing.

6. Create Open Access Resource Guides: College libraries should prepare subject-wise lists of trusted open access resources.

7. Provide Researcher Support: Librarians should provide assistance in literature searching, citation management, research visibility and scholarly publishing.

8. Identify Predatory Publishing: Researchers should be trained to critically evaluate unfamiliar journals and publishers before submitting manuscripts.

9. Encourage Multilingual Scholarship: Greater attention should be given to the preservation and dissemination of scholarly content in Indian languages.

10. Develop Institutional Policies: Universities and colleges should consider institutional policies supporting responsible open access and digital preservation.

Conclusion:

Open Access E-Resources have become an important component of the contemporary scholarly communication system. The Internet, digital repositories, open access journals and national e-resource programmes have transformed the way scholarly knowledge is created, accessed, shared and preserved.

For India, initiatives such as e-ShodhSindhu, N-LIST and Shodhganga demonstrate the importance of coordinated digital information infrastructure. INFLIBNET's programmes provide important mechanisms for connecting Indian higher education institutions and researchers with electronic scholarly information.

The development of open access should not be viewed simply as a technological change. It represents a broader transformation in the culture of scholarly communication. Researchers increasingly need to understand not only how to find information but also how to evaluate, publish, share, preserve and ethically reuse it.

In this changing environment, the academic librarian has an increasingly important role. Librarians can act as facilitators between researchers and digital scholarly resources by providing information-literacy training, research support, copyright guidance, repository services and awareness of responsible publishing practices.

The future academic library will therefore be not merely a place where information is stored but a dynamic centre for discovery, knowledge creation, scholarly communication and digital research support.

Open access, when combined with quality assurance, responsible licensing, research ethics, digital preservation and information literacy, can contribute to a more accessible and inclusive scholarly ecosystem.

References:

1. Budapest Open Access Initiative. (2002). *Budapest Open Access Initiative*. Budapest

Open Access Initiative. (Budapest Open Access Initiative)

2. Directory of Open Access Journals (DOAJ). (2026). *About DOAJ*. DOAJ. (Directory of Open Access Journals)
3. Directory of Open Access Journals (DOAJ). (2026). *Guide to applying: Open Access definition and licensing*. DOAJ. (Directory of Open Access Journals)
4. INFLIBNET Centre. (2026). *INFLIBNET Centre: Programmes and activities*. Gandhinagar: INFLIBNET Centre. (INFLIBNET)
5. INFLIBNET Centre. (2026). *Open Access Initiatives*. Gandhinagar: INFLIBNET Centre. (INFLIBNET Centre)
6. INFLIBNET Centre. (2024). *National Library and Information Services Infrastructure for Scholarly Content (N-LIST)*. Gandhinagar: INFLIBNET Centre. (INFLIBNET)
7. INFLIBNET Centre. (2024). *Shodhganga: A Reservoir of Indian Theses*. Gandhinagar: INFLIBNET Centre. (INFLIBNET)
8. UNESCO. (2021). *UNESCO Recommendation on Open Science*. Paris: UNESCO. (UNESCO)
9. UNESCO. (2026). *Open Science*. UNESCO. (UNESCO)
10. Budapest Open Access Initiative. (2012). *Ten-year Budapest Open Access Initiative recommendations*. Budapest Open Access Initiative. (Budapest Open Access Initiative)
11. INFLIBNET Centre. (2026). *E-Resources Directory*. Gandhinagar: INFLIBNET Centre. (Inflibnet)
12. INFLIBNET Centre. (2026). *e-ShodhSindhu: Consortium for Higher Education Electronic Resources*. Gandhinagar: INFLIBNET Centre.

Journal Indexing

Published by - Young Researcher Association, Kolhapur (Maharashtra)