Locating caste in the philosophies of Ambedkar and Lohia

The ideas of Dr B.R. Ambedkar and Ram Manohar Lohia have been the driving force for Dalit and lower-caste movements, respectively. It is strange that despite they being contemporaries and with similar agendas of fighting the caste system there has hardly been any attempts to find intersections in their thinking.

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Although Ambedkarite and Socialist movements have democratized[1] Indian society to a large extent, their project of emancipation and building an egalitarian society by uprooting the caste system remains unfinished. Two decades after the much-celebrated second democratic upsurge[2] the politics and policies of social justice appear to have reached its dead end (Yadav 2009: 1). The electoral rout of the Samajwadi Party (SP) and Bahujan Samaj Party (BSP) in the 2017 assembly elections of Uttar Pradesh is a reflection of the malice that has surrounded the lower-caste politics in India. The crisis is related to the manner and mode in which the lower castes have pursued the politics of social justice. The malice is fundamental in the sense that it has to do with the fragmentation of the idea of social justice itself. The politics of various social groups and communities such as Dalits, Adivasis, OBCs and Muslims is articulated in isolation, if not in opposition, to one another. The politics of social justice lacks a language to expand beyond its core social constituency (ibid 2-3). Not only does any electoral triumph of Hindutva forces undermine the foundation and idea of social justice, it also nullifies the hard-earned ijjat (respect) by the lower castes in post-independent India. The need today is of a larger alliance not only for the purpose of winning elections but also for fostering democratic principles and values with a commitment to fight against everyday forms of discrimination, humiliation and exploitation.[3]
We need to return to the text and ideologues of Bahujan politics and look at the ways in which their ideas can help us revive and rethink the politics of social justice in these dark times. The ideas of Dr B.R. Ambedkar and Ram Manohar Lohia have been the driving force for Dalit and lower-caste movements, respectively. It is both ironical and surprising that these leaders have been ghettoized both by the academician[4] and their so-called electoral blocs.[5] It is also strange that despite they being contemporaries and with similar agendas of fighting the caste system there has hardly been any attempts to find intersections in their thinking. To what extent are their views reconcilable without simplifying and reducing their differences? Can Lohia and Ambedkar help us negotiate the dilemma of politics and policies of social justice in contemporary India? If yes, then how? How can a dialogue between these two streams of thought help us develop an indigenous theory of justice and equality?

At the root of the difference between Ambedkarism and Lohiaism is whether caste is intrinsically related to Hindu religion – therefore annihilation of caste necessarily entailing the destruction of the religion – or merely a distortion of the principles of the religion. This difference in their perspectives also helps us understand why they employed and envisaged different strategies to fight caste oppression. Apart from the question on Hindu religion and its relation with caste their views are reconcilable and Lohia's work could be seen as an extension of Ambedkar's project not only in a chronological but also in a much more holistic and practical sense. However, both the Socialist and the Ambedkarite movements largely betrayed principles of their ideologues and were contained by particular sections of Bahujans for their sinister interests.

**DIFFERENCES**

The root of their disagreements lies in the history of national movement against colonialism itself. Despite an underlying affinity, Ambedkar and Lohia stood on opposite sides of the political divide, before and after Independence. The differences were unbridgeable before Independence. Lohia envisaged radical nationalism and recognized colonial configuration of power as a fundamental contradiction and thus did not want any compromise with the British. Contrary to him, Ambedkar refused to recognize the national/colonial division as the principal fault line; he was willing to join hands with anyone, including the colonial power, for realizing his ultimate objective of social emancipation (Yadav 2009: 1). So, Ambedkar presented what Gopal Guru calls beyond perspective vis-à-vis idea of nation (Guru 2011).

Ambedkar argued that caste system is intrinsic to Hindu religion. According to him, “it must be recognized that the Hindus observe caste not because they are inhuman or wrong-headed. They observe caste because they are deeply religious.” (Ambedkar 2014: 286)
Dr Ambedkar at a gathering of the prominent activists of the Independent Labour Party in Mumbai

On the other hand, Lohia is surprisingly silent on the question of caste and its relation to Hindu religion. His views are not explicit, so making any convincing conclusion is very difficult. He was probably toeing the line of Gandhi, who thought that caste system was a distorted aspect of religion and had nothing to do with the essence of Hindu religion (Ambedkar 2014: 350). He said that religious reform was crucial, though. According to him, “Religion will also have to be cleared of its rubbish about castes.” (Lohia 1964: 141)

For Lohia, the worst aspect of the caste system is the hypocrisy of Brahmin and Bania, who constituted the Indian ruling class (See Lohia 1964: 106-112). Why is Lohia not keen to attack the Hindu religion itself? Ambedkar took an uncompromising stand that the Hindu religion must be destroyed. The location of the thinkers is important for understanding why Lohia did not speak against the Hindu religion. Lohia was from the Hindi/Hindu heartland, which has seen more upper-caste revivalist/reformist organizations than lower-caste reform movements like that of Phule in Maharashtra and Periyar in Tamil Nadu that challenged Brahmanism and Hinduism. Hence, perhaps, it was difficult to take an anti-Hindu stand in the Hindi belt.

In terms of approach and vantage point, Ambedkar was particularly concerned about caste and its impact on Hindu society whereas Lohia was pained about how caste had degenerated the nation as a whole. They also differed on the Adivasi question. While Ambedkar considered them uncivilized, living in savage conditions, for Lohia, they were essential partners in the crusade against caste. He urged Ambedkar to become leader of all Indians and not only of the Scheduled Castes. After Ambedkar’s death, Lohia wrote:

I have always been trying to communicate to the Harijans in India, an idea which is basic with me. Dr Ambedkar and Sri Jagjivan Ram are the two types of modern Harijans in India. Dr Ambedkar was learned, a man of integrity, courage and independence; he could be shown to the outside world as a symbol of upright India, but he was bitter and exclusive. He refused to become a leader of non-Harijans. I can well understand the agony of the last 5000 years and their continuing impact on the Harijans. But that is precisely the point. Such a great Indian as Dr Ambedkar, I had hoped, would someday be able to rise above the situation, but death came early. I do not know Sri Ambedkar ... personally, but it is indeed painful to see such persons unable to rise above sectarian levels (Lohia 1964:19, 36-7).

Their political strategies reflected this difference in thought. Separation of Dalits from rest of Hindu society and forging a segregated identity formed the core of Ambedkar’s strategy. But Lohia’s politics was more aggregative and less segregative (Yadav 2009: 6-7). They also differed on the question of women’s problems and appropriate strategies to resolve them. Though Lohia accepted that women’s right to property and considered marriage important, he implicitly criticized Hindu Code Bill, drafted by Ambedkar, for ignoring the plight of Bahujan women. He said, “Women
must be given equal rights with men. Really speaking they must even get more if equality is to be obtained ... these laws are not relevant for more than 80 per cent of India's women ... They have a meaning only for a few high-caste women in Brahmin, Bania, and Thakur homes ... the act was good but incomplete and initiated by twice-born self-interest ... the problem of the majority of Indian women is the lack of water taps and latrines" (Lohia 1964: 58-59).

Lohia could not grasp the philosophy behind the Hindu Code Bill. Since women's sexuality, especially upper-caste women's, is one of the modalities through which caste system has been perpetuated, so liberating them from the shackles of patriarchy could be a breakthrough in struggle against caste.

The contemporary debate around quota within quota with regard to the Women Reservation Bill is highly influenced by Lohia's understanding of women's question, whose underlying assumption is that women as a whole are backward vis-à-vis man but that doesn't mean that all sections of women are equally discriminated against and there is an internal hierarchy that needs to be taken into account.

Another difference between Ambedkarite and Lohiate thought pertains to the (im)possibility of the annihilation the caste. Ambedkar, due to various reasons – the attitude of Brahmins and their privilege attached to the caste system and more importantly caste's link to religion – admitted that annihilation of caste is next to impossible. He envisaged conversion as emancipation and the only way out.

On the contrary, Lohia was optimistic about the destruction of caste. He wrote, “Is such a revolt possible? Scholars may with right deny it. Men of action will continue to affirm it. Some hope of success arises at the present time” (Lohia 1964: 85). For Lohia, even Ambedkar was a source of inspiration for fighting against caste. In his own words, “Dr Ambedkar was to me, a great man in Indian politics, and apart from Gandhiji, as great as the greatest of caste Hindus. This fact had always given me solace and confidence that the caste system of Hinduism could one day be destroyed.”

According to academic Yogendra Yadav, the inherent contradiction that the politics of social justice is facing is very much related to the intellectual tradition itself (Yadav 2009: 5). So, the revival of social justice depends on our ability to recognize and incorporate demands of other axes of politics, such as class within caste and gender. These demands are not necessarily intended to break the lower-caste solidarity. The electoral shift of lower castes towards the Hindutva forces is very much related to the other axes of injustices (Gudavarty 2014: The Hindu) being neglected.

**SIMILARITIES**
Although these figures were writing in different contexts and time periods, they held the caste system responsible for a number of ills in Indian society, from economic stagnation to cultural degeneration and vulnerability to external powers. Both believed that caste is contrary to progress, morality, democratic ethos and change.

Ambedkar deconstructed the premises upon which caste was justified, which ranged from division of labour to purity of race. He argued, “Caste does not result in economic efficiency. Caste cannot improve, and has not improved, the race. Caste has, however, done one thing. It has completely disorganized and demoralized the Hindus.” (Ambedkar 2014: 241)

This in turn has killed public spirit, community feeling and belongingness through prohibition of communication between different castes and has made prospects of organization impossible (ibid 251-256). Lohia also emphasized the role of communication between communities for national progress. According to him, “A black sadness prevails, for there is no novelty, no possibility of free conversation between the priests and the shoemaker.” (Lohia 1964: 3)

Lohia argued that caste has killed the capacity of adventure and joy, which is why Indian people are saddest and poorest on the planet. Both Ambedkar and Lohia have argued that poverty and unemployment are products of the rigidity of occupation within the caste system, which is contrary to the dynamic nature of the economy. Ambedkar wrote, “By not permitting readjustment of occupation, caste becomes a direct cause of much of the unemployment we see in the country.” (Ambedkar 2014: 235)

Taking Ambedkar’s conclusion further, Lohia suggested that the division between mental and manual labour, which produces income disparity, is responsible for the social stagnation of this country. Caste system does not provide any scope for innovation and scientific temperament, which is key to progress. Lohia even attributes the conquest of India by foreigners to internal quarrels due to caste (Lohia 1964: 81).

WHY HASN’T INDIA WITNESSED A SOCIAL REVOLUTION?

The question that troubled these thinkers most was why, despite such exploitation and subjection, there has been no social revolution in India. How has caste survived in India? What was the nature of power and how it perpetuated the caste system? Does it survive only through domination or legitimization, or both? Arun Kumar Patnaik argues that a broad view of caste power may have to take into account the hierarchy of domination and structures of legitimation. It must break with the binary view that treats caste as a process of domination or legitimation. It may not be inaccurate to claim that Gandhi and Ambedkar describe caste as a hierarchy of domination (untouchability for Gandhi and graded inequality for Ambedkar) (Patnaik 2009: 1). Ambedkar focused on how Brahmin’s domination has denied the lower castes access to arms or education to start a revolution. Due to these structural constraints that contained human agency, there were no revolt against caste in India (Ambedkar 2014: 274-276).

Lohia, on the other hand, focuses on caste as a legitimizing system: how does it gain support of the people and acceptability as a system? Lohia’s critique of caste is based on the recognition of its internal strength. Lohia’s critique is primarily interested in exploring why caste manages to survive centuries of resistance from within or without. Is there any strength in the caste order? He focuses on why Bahujans give consent to the domination of elites and its moral and legal paraphernalia? (Patnaik 2009: 2) Lohia has focused on how upper castes, through their superior skills and ideology, made lower castes a willing part of their conspiracy. So, for Lohia, it was moral and cultural supremacy due to which lower castes consented their own subjection. It is close to the Gramscian notion of hegemony. For him, “... a long tradition of ideological subjection has made them stagnate ... centuries have instilled into them a meek acceptance of the existing, aversion to change, sticking with the caste in times of adversity as of good luck, and the search for high life through worship, rituals and general politeness” (Lohia 1964: 85).
But Lohia also does not deny the role of domination. According to him, “Caste gives them insurance, indeed, on less than animal level, more than it does to the high castes. They would feel helpless without it” (ibid 84). So, for Lohia, it was consent backed with some sort of coercion that has stopped lower castes to revolt but in Ambedkar's reading it was coercion or domination.

THE NATURE OF SOCIAL AND POLITICAL CHANGE

Since there are many contradictions in society, the first task on which the future course of action depends is to identify the primary contradiction and to trace its roots and nature. Ambedkar argued that social reform should take precedence over political reform. Both Ambedkar and Lohia attacked Communists for their economic interpretation of Indian reality in which the question of caste was sidelined or merely treated as part of the superstructure of underlying economic relations. According to Ambedkar, "If the source of the power and dominion is, at any given time or in any given society, social and religious, then social reform and religious reform must be accepted as the necessary sort of reform." (Ambedkar 2014: 230).

According to him, the proletariat will only revolt when it is sure that after revolution there will be no discrimination on the basis of caste or creed. Only a sense of equality and fraternity can motivate them to go against caste. Since individuals do not identify themselves only as poor but also as members of a particular caste, it is impossible that they will rally behind the identity of poor. Thus, he argued that socialists would have to consider caste as the fundamental question if they wanted to make Socialism a living reality because, “Caste is the monster that crosses your path. You cannot have political reform, you cannot have economic reform, unless you kill this monster” (ibid 233).

Despite being a socialist, Lohia took Ambedkar’s argument further to identify the illusion or fallacy of socialists. For him, those who only talk about political and economic reforms and sideline social reform are socialists with vested interests because, “Even after the completed economic and political revolution, they [high castes] would continue to supply the managers of the state and industry. The mass of the people would be kept in a state of perpetual physical and mental lowliness, at least comparatively ... But the position of the high caste would be then be justified on the grounds of ability and in economic terms as it is now on grounds of birth or talent ... What it loses in respect of caste by birth, it gains in respect of caste by merit.” (Lohia 1964: 96–97).

Experience of the communist government in West Bengal substantiated Lohia's apprehension about inadequacy of class analysis to explain the humiliation, exploitation and subordination. The economic mobility through redistributive
policies was neither accompanied by nor was in proportion to social mobility (Bhattacharyya 2016: 18–24) and upper castes have dominated the legislative assemblies and leadership despite the substantial presence of Bahujans in the population of the state (Jaffrelot 2008).

Hence, Lohia argued that without waging a war on segregation of caste and gender, all war on poverty is a shame. But unlike Ambedkar he argued that caste destruction is also inadequate if it is not undertaken simultaneously with class destruction. One can imagine the importance of social reform while looking at how despite political independence social tyranny is rampant and structural transformation of social relations is overdue in contemporary India.

CRITICS OF THE TRADITIONAL NOTION OF EQUALITY OF OPPORTUNITY

Equal opportunity ensures that an individual's destiny is the result of their choices, not of their circumstances. Justice as fairness entails that distribution of resources should not be affected by those factors that are morally arbitrary.

Ambedkar problematized Herbert Spencer's “Social Darwinism”[6], arguing that the survival of the fittest will be disastrous for the weakest. In countries like India where socio-economic inequality is so huge, that traditional equality of opportunity, based on the notion that individuals are owners of their attributes, will favour the privileged. For Ambedkar, an individual's strength is dependent upon physical heredity; social inheritance like parental care, education and accumulation of scientific knowledge; and lastly on his own efforts. But the majority of people were not allowed to make choices, so they themselves cannot be solely held responsible for their condition. Preferential treatment is essential to amend the existing exclusions, without which equal opportunity will produce a selection of the privileged. (Ambedkar 2014: 261-262)

Arguing along these lines, Lohia said that certain skills and abilities have become hereditary due to the caste system. He claimed that an individual does not have substantial control in deciding her/his life goals due to rigidity and exclusion produced by the caste system. Society has recognized some skills as superior, which will automatically bring unequal social status and monetary rewards. Merely equality of opportunity is not sufficient because, he said, “It would be the battle of five thousand years of oppressive training and tradition against an individual talent. Only the genius or the exceptionally able would win in the battle to make this battle a somewhat equal encounter. Unequal opportunities would have to be extended, to those who have so far been suppressed” (Lohia 1964: 96).

HOW TO ANNIHILATE CASTE

Unlike the Hindu reformers, both Ambedkar and Lohia were convinced that this system of inequality could not be repaired or reformed – that an end to caste-based inequalities was possible only if the caste system was brought to an end. Their main goal was annihilation of caste, without which Swaraj or independence was meaningless for the masses. Both of them engaged in an open-ended search for ways of bringing about an end to the caste system. Ambedkar was sceptical about any such possibility since the graded inequality of caste system made it difficult to forge a united alliance for common purpose, because after the revolution the fruits were not going to be distributed equally among the crusaders.

Lohia also signals this danger in which the anti-caste movement has been diluted thanks to vested interests. For instance, the Marathas, previously lower castes who came to power through anti-caste struggle, recently agitated against the Dalits and demanded the repeal of the Atrocities Act. According to him, “Ever and ever again the revolt of the down-graded castes has been misused to upgrade one or another caste rather than to destroy the entire edifice of caste.” (Lohia 1964: 91).
For Ambedkar, the remedy lay in the destruction of the authority of the shastras, inter-dining and most importantly, inter-caste marriages to do away with the illusion of purity of blood. Lohia also emphasized the role of inter-caste marriage but with two important additions. First, inter-caste marriage is only effective when it takes place between a Shudra and a Dwij because marriages between Banias and Brahmmins are not going to dent the caste system. Second, though he wished that these marriages were voluntarily, he temporarily tried to institutionalize the inter-caste marriage between Dwijas and Shudras, by making it a mandatory qualification for recruitment to administration and armed forces. Lohia believed that this was the only way to destroy the segregation based on caste and gender (Lohia 1964: 4). He suggested that even the nomenclature must go. So, Lohia was keen to use the state machinery to destroy caste.

But the reality shows that Socialist movement has not made a strong case for inter-caste marriage. They have betrayed Lohia at least on the issue of women and the commitment to uproot caste.[7](#_edn7)

Lohia was aware of the parochial outlook of the Shudras but he proposed that they must be placed in positions of power and efforts made to enable them to imbibe a new worldview so that they can think of the nation as a whole (Lohia 1964: 13-14). Struggle against caste is also difficult because the lower castes have a tendency to become like the upper castes (Sanskritize). For him, “it is true that, placed in petty positions of power, a Sudra may initially turn out to be more cruel than Dwija ... he suffers from the same mad desire for prestige but in our uphill journey, these initial steps are unavoidable.”(ibid 67)

Criticizing the Dravidian movement for its violence and hatred against Brahmin, the person, he suggested that there should be no place for enmity, jealousy and hatred against the Dwijas and a sense of equality and fairness should be the fundamental premise of anti-caste movement. That can only be possible when Shudras realize that an overwhelming majority of Dwijas are among the deprived. He tried to convince Dwijas that the anti-caste movement is not directed against them but it is for regeneration of the nation as a whole. He wrote, “I have no enmity with thread-wearers. I want to raise them too. But I know they can rise only when Shudra, Harijan, Women and Muslims also rise. This, the thread-wearers do not understand. They think that if the backward class rises, they will degrade. This ignorance is the root of evil.” (Lohia 1964: 41-42)

He claimed that the fight against caste will start in earnest when 60 per cent reservation is given to Harijans, Shudras, Adivasis and women in administration, judiciary, military and industry. Abolition of caste will ensure self-respect, and economic upliftment will close the gaps between the classes, thus resolving the twin problem of caste and class.

**CRITICAL APPRAISAL**

These two organic intellectuals represented two phases of politics of social justice. While Ambedkar represented a moment of departure of the social justice movement in pre-independent India, Lohia took his project forward and prepared the blueprint for the future of social justice (Yadav 2009: 3-4). Our task is to synthesize these two traditions.

Both agreed that it is meaningless to talk of equality while maintaining separate castes. Both emphasized equality, fairness, fraternity and a sense of justice but unfortunately these values only have a rhetorical presence in the lower-
caste movements today. Despite the democratic upsurge of Bahujans, intra- and inter-caste conflicts are rampant. Democratization of caste has fragmented the castes and made them competitors vis-à-vis the scarce resources of the State to the extent that there is no end in sight to the hostility between different castes. These present realities forces one to think that the annihilation of caste is a utopian project because neither upper castes are joining the movement voluntarily nor a strong attempt is being made by Bahujans to bring the downtrodden among upper castes on board in their crusade against caste.

Apart from the question of the relationship between caste and the Hindu religion, the views of Ambedkar and Lohia are reconcilable. The need of the hour is for the Ambedkarites and Lohiaites to come together. Politics of caste and Bahujans is shaped by electoral calculations. While discourses of justice "Bahujanized" politics, they also proved to be constraining. However, the electoral system and the capturing of State power are not the only means to fight caste. Social and cultural movements can overcome the deficit produced by the electoral politics of Bahujans and the questions of dignity, justice and fraternity can overshadow electoral metrics. Movements like those in Una offer hope that caste can be destroyed and people can come together to fight against collective injustice. It does not matter how long these “moments of commonality' (term borrowed from Sheldon Wolin) are but they certainly makes us optimistic about such a possibility.

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[1] By democratization I mean withering away of the hierarchical social relationship between different sections of society.

[2] Politicization of the lower castes and their mobilization around Mandal movement has culminated in the capturing of State power by the lower castes leaders especially in North India. It was celebrated as a ‘Second Democratic Upsurge’ (Yadav 2000) or ‘Silent Revolution’ from the ballot (Jaffrelot 2003) or ‘Vernacularisation of Democracy’ (Michelutti 2008) or ‘Indianization of Democracy’ (Varshney 2000).

[3] The task is difficult since now the OBCs have been in the forefront of atrocities against Dalits. If anything, OBC parties like the Samajwadi Party (SP) have campaigned against the SC/ST Atrocities Act. The relatively better positioning of OBCs in caste hierarchy, and the assertion of Dalits can undermine the privilege enjoyed by these relatively well-off castes. See Teltumde, Anand (2010), *The Persistence of Caste: India's hidden Apartheid and the Khairlanji Murders*, Navayana; and Kumar, Avinash (2015), *Criminalisation of Politics: Caste, Land and the State*, New Delhi: Rawat Publication.

[4] One such example is Valerian Rodrigues, in his illuminating article titled ‘Dalit Bahujan Discourse in Modern India’ in *Political Ideas in Modern India: Thematic Explorations*, eds V. R. Mehta and Thomas Pantham, Sage Publications (2006). He does not even mention Lohia’s name in the list of thinkers.
Yadav has brilliantly outlined this issue: “The attitude of their followers confirms this suspicion. The Ambedkarites are still unwilling to trust Lohia, or any socialist for that matter, as ideological ancestors. Mulayam Singh Yadav’s invocation of Lohia may have confirmed his image as an OBC champion. Lohia’s attempt to think of caste along with class and gender is likely to appear as a dilution to the Ambedkarites. To the Lohiaites, anyone other than their own ‘doctor sahib’ is unacceptable. They think that Lohia had transcended the one-dimensional thinking represented by Ambedkar” (Yadav 2009: 9).

Spencer extended Darwin’s theory to the social world and argued that a process of natural selection also exists within human society, which is characterized by the principle of “the survival of the fittest”. Society was therefore portrayed as a struggle among individuals for survival. Those who are best suited by nature to survive, rise to the top, while the less fit fall to the bottom. Inequalities of wealth, social position and political power are therefore natural and inevitable, and no attempt should be made by government to interfere with them (See Heywood 2003: 44).

For instance, Rashtriya Janata Dal (RJD) supremo Lalu Prasad Yadav whose party claims to be based on Lohia’s ideology has not married even a single child in any other castes than Yadav. Another so-called socialist, Mulayam Singh Yadav, also is on the same track but with an exception that his son has married a girl from Rajput community. This shows the hypocrisy of socialists and their lack of commitment to Lohia’s principles.

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