



Reservation and social mobility: Revisiting Mandal Movement

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Abstract

Mandal Movement was one of the crucial social justice movements in independent India. This movement sparked extensive discussions on caste, meritocracy, and affirmative action. It was based on the Mandal Commission's 1979 recommendations, according to that there was 27% quota reserve for Other Backward Classes (OBCs) in public employment of the central government. This study examines the impact of reservation policy on the socio-economic mobility of OBC community. It looks at how affirmative action changed access to political representation, work, and education. It includes escalating caste-based division and sparking protests across the country as well. It examines whether reservation has served as a legitimate tool of social mobility or as a politically useful tactic. The confluence of caste with class and gender, geographical differences, and intra-OBC disparities is all given particular emphasis. The results imply that although the Mandal Movement gave millions of OBCs more chances. It also revealed structural flaws in India's affirmative action system. The Mandal Movement provides important insights into the intricate connections between changes in society, state policy, and the ongoing discussions in India about inclusive development and reservations.

Keywords: Mandal commission, OBC reservation, social mobility, affirmative action, caste system

Introduction

Independent India can be divided into two broader categories to understand social mobility: pre-Mandal and Post-Mandal society. The Mandal Commission is known as second Backward Classes Commission that submitted its report in 1980 [3]. The Commission describes disparities between the upper castes and the lower castes. Mandal Commission recommendations were based on the collection of data from various state and central government departments, surveys across the country, studies of state-based measurement criteria to identify backwardness and so on. The crucial aspect of the Commission was that it provided data of backward classes whose population was more than half of the total population of the country, but their representation in the dominant structure was inadequate. Therefore, the report of the Mandal Commission brought a debate and discussion in academia and the political sphere. In 1990, V. P. Singh announced to implement the 27% reservation for OBC candidates in government jobs. In north India, there was movement against and in support of the commission's recommendations.

Literature Review

Literature review is the crucial component of any research to find research gap. The study includes various articles written by scholars regarding the various facets of Mandal Movement. Literature are categorised in two broader areas. In first category, it includes literature criticise Mandal Movement and suggest need to reconsider criteria of backwardness. Second category include literature discuss importance of Mandal Movement and social mobilization among the OBCs community.

Palshikar, S. (2008) [14], in his work Challenges before the Reservation Discourse, explored the various aspects of social justice. Following the Supreme Court's rule, two strong requests were made. These were the elimination of the "Creamy Layer" policy and the introduction of quotas for

jobs in the private sector. The Indian Constitution provides certain help in identifying the OBC category. There has not been enough discussion between social scientists and policy planners. There are various line drawn by intellectuals such as Dalit/non-Dalit (Ambedkar), Brahmin/non-Brahmin, Shudras, Atishudra, and Shetji-bhatji etc. The Category Bahujan later attracted the attention of numerous academics, intellectuals, and activists in Maharashtra throughout the 1920s and 1930s. Palshikar offered two criticisms of the Mandal Commission. First, there should be other ways to be included in the OBC group besides caste. Second, this cannot be evaluated in the absence of material conditions of backwardness. Mandal also highlighted the foundation for developing a policy package by collecting vast amounts of data, with government assistance, in a methodical and socially scientific manner. The Court states that two problems need to be determined. One is an impoverished household, and the other is mingling groups. Mandal used the low economic criterion to determine "social and educational backwardness."

Kumar, R. A. (2008) [10, 11], made the case that reservations are crucial but insufficient for social justice in his book Equality with Social Justice. Kumar challenges the "Youth for Equality" who claim that the reservation policy is unfair. Is it feasible to obtain equality without achieving social justice? It is noted that caste and poverty are major obstacles to attending school. Compared to other rural communities, children from the Scheduled Caste group face the issue of prejudice at the admission stage.

In his article Policy Changes Needed on Reservations, Saksena, K. D. (2007) [16] emphasized the distinction between caste and class. He contends that the report of Mandal Commission is founded on a conceptual misunderstanding. The Commission uses the terms "community," "class," and "caste" interchangeably. Firstly, caste membership is inherited or determined by birth, whereas class membership is not. Second, class is an open group that people immediately

join when they have anything in common with others. However, caste is a closed group with endogamy. Third, vertical mobility allows a person to rise to a higher class or fall to a lower class in the social hierarchy. Horizontal mobility, on the other hand, allows a person to stop sharing a situation with one group of people and begin doing so with another, but caste mobility does not allow for mobility. Fourth, certain economic factors, such as income, occupation, ownership of land or other means of production, and site of residence (such as slum residents), can be used to differentiate classes from one another. Certain castes, which are essentially founded on religious and mythological traditions rather than economic divisions, may have a customary or inherited occupation.

In his book *Caste, Inequality and Affirmative Action*, Beteille, A. (2008)^[5] highlights the various manifestations of caste and inequality. He claimed that while caste and inequality are closely related, caste is not the cause of all inequality. Inequality in Indian society was caused by the agrarian social structure. The logic of the feudal system and the “estates” was thoroughly discussed in medieval European history. Long-standing injustices cannot be eliminated by merely enacting new constitutional principles. Beteille goes on to say that backward classes are made up of a variety of castes and communities that differ even more in their social and economic status than designated tribes or castes. The prevailing consensus is that these should not be permanently included in the Constitution because they will eventually expire.

In his paper *Exclusive Inequalities merit, caste and discrimination in Indian Higher Education Today*, Deshpande, S. (2006)^[6] contended that those who opposed OBC reservations in higher education stated that this was vote bank policy. The National Sample Survey Organization (NSSO) of 1999–2000 conducted one of the five major annual surveys that covered the entire nation, which is when Mandal-II had its start. According to Deshpande, the tremendous expansion of state-funded higher education during the Nehruvian era shows that the middle classes of the upper caste transformed their capital and land into credential capital. It offered jobs, training, and educational opportunities. This kind of historical opportunity was unique and was not available to any subsequent generation. But it makes prejudice worse. Higher education is skewed against lower caste members, the impoverished, and other socially marginalized groups.

According to Morris, S. (2006)^[12] in his paper “OBC reservations in Higher Education: Are they Worth All the Turmoil,” argues that OBCs were never subjected to the same social exclusion and discrimination as SCs and STs. OBCs belong to the Indian middle class and are well-represented in business and higher education. Therefore, the claim that “class equals caste” would not apply to OBCs. In IIMs, 20% of all students are OBCs. For instance, the Ezhavas caste in Kerala has greater economic and intellectual advancements than many upper castes in northern India. Before the Narayan Guru’s Movement, Kerala’s Ezhavas caste was more primitive.

In their book *Indian Toiler Should Reject the Framework of Reservation*, Kumar and Jones (2008)^[10, 11] noted that OBCs are a state-defined caste groups that were discovered to be socio-economically backward in the 1970s. OBCs have historically been viewed as socially inferior by the Hindu upper castes. Reservations for OBCs in centrally located

educational institutions were opposed. The extension of OBC candidates’ reservation in central government-funded universities. According to the Left Front government, is a blow against caste privilege and social justice. The majority of middle-class and wealthy Indians have profited from India’s low-cost labor production, research, and business processing for international markets. The National Commission for Backward Classes, or NCBC, ought to mediate and update the castes that belong to other backward classes regularly.

In his article *Merits of Reservations*, Ilaiyah, K. (2006)^[7] made the case that expanding democratic spaces is the goal of reservation policy. Indian democracy was largely an upper caste system before Mandal. He contends that the concept of social justice in Indian society differs from what John Rawls proposed. In the context of the Mandal Commission discussion, the topic of women’s 33% reservation in Parliament and state assemblies came up. Based on the “reservation within reservation” concept of female social justice, OBC leadership lobbied for women’s reservations. The caste-based system in India can be peacefully transformed thanks to the reservation policy.

Research Gap

There are many studies on reservations regarding the identification of backwardness. Many scholars interpreted reservation as a matter of exclusion. However, there is not much research on mobility in society through reservations, in general, and by the Mandal Commission, in particular. This research article seeks to understand the role of reservation in social mobility.

Research Methodology

This study uses a qualitative research design that incorporates social and historical analysis. To comprehend the Mandal Movement’s influence on reservation policy and social mobility among Other Backwards Classes (OBCs), secondary literature, government reports, and archival materials are examined. To capture the socio-political dynamics of caste-based affirmative action, the design places a strong emphasis on interpretive analysis. In primary data, the study includes reports of the Mandal Commission, debates in parliament, documentation of the policies, archival records, etc. The secondary data includes articles written by scholars, debates and discussions, books, and so on.

Backward Classes in the Indian Social System

It should be noted that India is one of the world’s largest nations, with a variety of castes, cultures, and faiths. It should be noted that the caste system forms the basis of the religion. OBCs are a subset of some castes, including fishermen, carpenters, and barbers. Brahmins, Non-Brahmins, Shudras, Atishudras, and Untouchables comprise the castes. It should be noted that while lower strata were denied opportunity, upper castes received all the benefits. As a method of social organization, varna systems classify people according to the services they provide to the community. Brahmins are at the top of the social hierarchy, and their job is to teach spirituality and education. Teaching holy literature like the Vedas and Puranas is part of their job. They carry out religious rites and sacrifices, and they instruct others on how to do the same. Kshatriyas follow Brahmins, who are regarded as honorable and societal guardians. They are required to exhibit significant character and physical strength. Farmers, traders,

and businesspeople make up the Vaishya, who occupy the third rung of the social hierarchy (Sharma, 1990:11) [18]. In the post-Vedic era, the occupation-based social structure declined. Shudra, who serves the first three Varnas, is the fourth Varna. The Varna system was replaced by the Jati or caste system, which developed into a system of social stratification. It led to a rigid division of society with birth-based membership. One group of people (Brahmin) and another (Non-Brahmin) were pitted against each other by the system. They are treated inhumanely since they were born into a lower caste. In every aspect of their lives, members of lower castes faced discrimination and cruelty. Vedic and Post-Vedic philosophical systems divide society. In Hindu society, Vedic philosophy has a significant influence. It lists the goals of leading a Hindu life (Sharma, 1990:11) [18]. According to the concept of Dharma, a man who does well in life will be born into a high caste in his subsequent incarnation. The idea of pollution was set from birth and could not be altered throughout life (Basham, 1989: 32) [4]. Ambedkar had a different perspective on the caste system. He claims that the caste system is a division of laborers rather than just a division of labor. The divisions of laborers are ranked one above the other in this hierarchy. In caste system, the division of labour is not based on choice. It has no place for personal feelings or preferences. Predestination is the foundation of the caste system. People of the same race are socially divided under the caste system (Ambedkar, 2003: 42–47) [2]. To help the subaltern classes of society, the Indian government created laws and policies. As a result, the Central Government instituted reservations for OBCs in two stages in accordance with the advice. Mandal-I was first employed by the government in 1990. 2006 saw the implementation of reservations in accordance with Mandal-II's suggestion.

Report of the Second Backwards Classes Commission

The Central Government rejected the First Backward Classes Commission due to its validity. In order to determine the circumstances of socially and educationally backward strata, the Morarji Desai government established this Commission in 1979. B.P. Mandal chaired this commission, which is why it was named the Mandal Commission after him. The Mandal Commission established many standards for classifying people as socially and educationally backward. The commission created questionnaires for State Governments, Ministries/Departments, and general public voluntary organizations. It also prepared questionnaires for tours of the commission, socioeconomic field surveys, caste studies, special reports and analysis of census data. Caste indexing 1891/1931 and village studies by the Anthropological Survey of India, and legal and constitutional issues. The Mandal Commission identified primitive tribes, aboriginal tribes, hill tribes, forest tribes, and Indigenous tribes using the 1961 census report. The 86 questions of the State Government questionnaire were broken down into seven sections: (1) criteria; (2) safeguards, reservations, etc.; (3) census; (4) social; (5) educational; (6) welfare; and (7) employment. This survey was sent to the union territory and state governments on April 11, 1979. The objective of the commission was to find out how many OBCs were represented in local organizations, government jobs, state public service commissions, the courts, etc. OBCs were not recognized in many states, and those states were unaware of them. Such a list was announced by 16 states and 2 union territories, and several of them took equitable action for

OBCs. A questionnaire was sent out on March 19, 1979, to gather information on the representation of all kinds of backward class personnel working for the Indian government in all departments and ministries (Report of Backward Classes Commission, 1980: 37–42) [3].

Report of the Mandal Commission

Category of employees	Total number of employees	Percentage of SC/ST	Percentage of OBC
Class 1	1,74,043	5.68	4.69
Class 2	9,12,786	18.18	10.63
Class 3	4,84,646	24.40	24.40
Class 4	15,71,475	18.71	12.55

Source: Report of the Backward Classes Commissions, 1980, Vol. 1, p. 42 [3]

This indicates that OBCs were under-represented in government services compared to SCs and STs. Although it made up more than 50% of the population, it was less than 5% in class-1, or roughly 1/10th. Its representation was only 12.55% across all grades, which is significantly lower than its population. Under the three major categories of social, educational, and economic, the Commission developed eleven “indicators” to assess social and educational backwardness. Eleven criteria—four social, three educational, and four economic—were chosen by the Mandal Commission to determine OBCs. Poverty, livelihood, occupation, etc., were also covered by this.

Mandal Commission and Criteria for the Identification of Socially and Educationally Backward Classes

It should be noted that the socio-economic, educational, and other conditions of OBCs must be examined in this regard. Castes or classes that other people consider to be socially backward; a) Castes and classes whose primary source of income was manual labor; b) Castes and classes where, in rural regions, at least 25% of women and 10% of men married before the age of 17, and in urban areas, at least 10% of women and 5% of men did so; c) Castes and classes whose female labor force participation was at least 25% higher than the state average. d). Three criteria were used to determine educational backwardness: e) Castes or classes where the proportion of children aged 5 to 15 who had never attended school was at least 25% higher than the state average; f) Castes and classes where the percentage of students who drop out between the ages of five and fifteen was at least 25% higher than the state average; g) Castes and classes where the percentage of matriculates was at least 25% lower than the state average. Four standards were established by the Commission to determine educational backwardness. h) Castes and classes in which the average family asset value was at least 25% less than the state average; i) Castes and classes where the proportion of families resided in Kuchcha (raw) dwellings exceeds the state average by at least 25%; j) Castes and classes where more than 50% of households had a drinking water source more than half a kilometer away; k) Castes and classes where the proportion of households that had taken out consumption loans is at least 25% higher than the state average (Report of Backward Classes Commission, 1980: 52).j) Castes and classes where more than 50% of homes had a drinking water source that is more than half a kilometre away; k) Castes and classes where the percentage of households with consumer loans was at least 25% higher than the state average (Report of Backward Classes Commission, 1980: 52).

Each group was given a distinct weight for each indicator: three points for social indicators, two points for education, and one point for economic criteria. Each indication received an overall score of 22. According to this application, castes with a score of 50% (11 points) or higher were classified as socially and educationally backward. While the remaining castes were classified as socially advanced average (Report of Backward Classes Commission, 1980: 52). The Mandal Commission considered caste as an crucial element to identify backward classes. In Hindu society, caste has a significant role in backwardness. It applied many criteria to non-Hindu populations, as shown below.

Caste System among Non-Hindu Religious

After conversion, non-Hindu communities had deeply rooted notions of social stratification and hierarchy. Among egalitarian religions like Islam, Christianity, Sikhism, etc., Hindu converts un-intentionally served as caste system Trojan horses. Non-Hindu minorities in pre-documentary Hindu India were unable to avoid the country's prevailing social and cultural effects. Although there was a concept of hierarchy among Muslims. Caste as a social relationship was significantly altered and reduced. Indian Christians were also affected by this kind of circumstance. Christians in Kerala were split into different ethnic groups according to their caste background and different denominations, according to their beliefs and traditions. Converted Harijans were considered untouchables in Hinduism and Christianity. Non-Hindus asserted that since they reject caste and untouchability. Caste cannot be used to categorize people as socially and educationally disadvantaged. The following criteria were approved by the Commission to define non-Hindu classes that are socially and educationally backward: The list of Hindu OBCs includes all untouchables who converted from Hinduism to non-Hinduism as well as occupational communities known by their traditional hereditary names. For instance, the Commission used the 1931 census to determine the number of castes and groups, such as Dhobi, Teli, Dheemar, Nai, Gujar, Kumhar, Lohar, Darji, Badhai, etc. These were gathered under five general headings: Scheduled Castes and Scheduled Tribes, Non-Hindu Religious Communities, Forward Hindu Castes and Communities, Backward Hindu Communities, and Backward Non-Hindu Communities. As a result, the combined number of Hindus and non-Hindus OBCs was approximately 52% (43.70% Hindu+ 8.40% Non-Hindu) of the nation's total population (Report of Backward Classes Commission, 1980: 56). The Commission takes into account court rulings and fixes them within constitutional provisions.

Recommendations of the Mandal Commission for Backward Classes

According to their numbers, SCs and STs had a 22.5% reserve in the federal government and provisions in each state. The Supreme Court ruled that the entire amount of reservation under Articles 15(4) and 16(4) of the Constitution should not be greater than 50%. As a result, the Commission suggested setting aside 27% for "socially and educationally backward classes." This advice has no bearing on the states that have already implemented reservations for OBCs. The Commission has suggested the following general OBC reservation plan with reference to the amount of reservation: OBC candidates who are hired based on merit in an open competition will not be regarded as reserved candidates. This

also applies to the promotion quota at all levels. Unfilled reserved seats should be carried over for three years until they are deserved. The upper age limit for OBC candidates for direct recruitments should be relaxed in the same way as it is for SCs and STs candidates. The relevant authorities should adopt a roster system for each category of post in the same way that they currently do for SCs and STs candidates. The Central and State governments, as well as nationalized banks, will be allowed to use this reservation method for public sector projects. All private sectors that receive any kind of financial support from the government are also required to hire employees based on the aforementioned criteria. Universities and related colleges were also subject to this reservation scheme, and the government ought to enact legislation to carry out these suggestions (Report of Backward Classes Commission, 1980: 58) [3].

Report of the Mandal Commission was being discussed in both chambers of parliament in 1982. The report was delivered to the government in December 1980, was referred to a committee of secretaries for review. Nevertheless, the government showed no interest in putting the Commission's conclusions into practice. Following that, the V.P. Singh-led Janata Government declared a 27% reservation for OBCs in civil positions and services within the Indian government. Across the nation, protests against reservations broke out. 160 young people committed suicide in opposition to reservations between mid-September and mid-October 1990. There were protests against reservations around the nation. When the Congress government took office in 1991, Narasimha Rao instituted a 10% reservation in open positions for other economically disadvantaged individuals who were not on the Commission's list (Ahuja, 2014:86) [1]. The government's decision was contested in court because it was unconstitutional.

Role of Mandal Movement in Social Mobility

A turning point in India's sociopolitical history, the Mandal Movement radically changed the conversation around caste, affirmative action, and social mobility. The movement was sparked by Prime Minister V. P. Singh's 1990 execution of the Mandal Commission's recommendations. He recommendation 27% reservations for Other Backward Classes (OBCs) in central government. While this decision sparked massive demonstrations and instances of self-immolation from upper-caste groups. It also inspired marginalized populations to demand equal representation in public life and to exercise their rights.

When the Mandal Commission was first established in 1979, it conducted a thorough survey to determine which classes were socially and educationally disadvantaged. Its conclusions highlighted OBCs' structural disadvantages, especially with regard to political representation, work, and education. The adoption of its recommendations represented a symbolic acknowledgement of caste as a factor contributing to socio-economic disparity in India rather than just a shift in policy (Kumar, 2019: 45-52) [9]. The Mandal reforms expanded social justice and democratized access to state resources by extending affirmative action beyond Scheduled Castes (SCs) and Scheduled Tribes (STs).

The Mandal Movement had a significant effect on social mobility. Reservations gave OBCs access to government jobs and higher education, two fields that had previously been dominated by upper castes. People from underprivileged backgrounds were able to find steady employment, improve

their social standing, and take an active role in governance thanks to this access, which promoted upward mobility. With the emergence of OBC-led parties like the Samajwadi Party and Rashtriya Janata Dal, which championed the cause of underprivileged sections and reshaped electoral politics in North India, the political landscape also saw a significant transformation. These changes promoted a more inclusive political system and undermined the monopoly of upper-caste elites (Jaffrelot, 2003) [8].

The Mandal reforms did, however, also highlight the difficulties of social mobility in a hierarchical system. Dalits and Tribals continued to experience systemic exclusion, especially when it came to land ownership, work in the business sector, and social recognition, even if OBCs profited greatly. The unequal benefit distribution brought to light the reservation rules' inability to address more fundamental structural injustices. Furthermore, the emergence of caste-based identity politics strengthened caste differences and made social cohesion more difficult, despite benefiting marginalized groups (Pai, 2002 & Shah, 2002) [13, 17]. The Mandal Movement has wider ramifications than just short-term improvements in employment and education. It altered India's political discourse on caste and equity, challenged the supremacy of higher castes, and democratized power structures. In order to guarantee that social mobility is not limited to a small portion of the population. It also emphasized the necessity of complementary reforms, such as high-quality education, land redistribution, and private sector inclusion. Thus, the Mandal era serves as a reminder of the unfulfilled agenda of equity in Indian society as well as a triumph of social justice (Yadav, 1999: 2393-2399) [19]. Other Backward Classes are heterogeneous in nature and states have different criteria to measure backwardness (Rawat, 2023: 20) [15]. On the basis of Mandal's report, social mobility in southern India was before the implementation of Mandal's recommendation. Mandal movement changed the political scenerio of North India and because of that later there was emergence of various regional political parties.

Conclusion

Mandal Movement was one of the most pivotal moments in India's democratic history. This movement changed the face of social mobility, politics, and caste. The Indian government officially recognized the structural disadvantages experienced by Other Backward Classes (OBCs). Government expanded affirmative action beyond Scheduled Castes and Scheduled Tribes in 1990 by putting the Mandal Commission's recommendations into practice. The movement's twofold impact—material and symbolic—is what makes it significant. In a material sense, reservations created avenues for upward mobility. It allows OBCs to get steady employment and gain access to establishments that had previously been dominated by upper castes. In a symbolic sense, it gave communities the authority to seek acknowledgement and representation by validating caste identity as a valid foundation for social justice and political mobilization. This newfound agency is best illustrated by the emergence of OBC-led political parties and leaders in the post-Mandal era. When electoral politics increasingly represented the goals of groups that had previously been shut out of mainstream administration. Therefore, Mandal Movement served as both a reminder of India's unfulfilled egalitarian objective and a victory for social justice. It changed the conversation about caste and mobility,

challenged upper-caste control, and democratized access to public resources. It also demonstrated the continued existence of structural injustices. Mandal's legacy rests in its capacity to broaden the scope of social justice while forcing Indian society to address the more fundamental issues of inequality, exclusion, and the pursuit of a truly inclusive democracy.

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