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Contents

Articles

- Reforming the Affirmative Actions for Deepening Inclusiveness of India's Socio-Economic Development 1-21
Kishore Kumar Sutradhar, M. P. Bezbaruah and Utpal Baishya
- Maternal Healthcare in the Indian Himalayan Region: Evidence from NFHS-5, 2019-21 22-43
Rupon Basumatary and Agnes Teronpi
- Gendered Labour Governance and Unequal Rights in Tea Plantations: Evidence from Golaghat, Assam 44-65
Jayatree Buragohain and Meenu Anand
- Inclusion of Gender-Diverse Students in Higher Education: Institutional Preparedness and Policy-Practice Gaps in Kerala 66-82
Neenu Mathews
- Rethinking the Notion of 'Place and Placelessness' in the Experience of Migrant Workers in West Bengal During Covid-19 Pandemic 83-104
Soumyajit Halder and Aritra Chakraborty

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Reforming the Affirmative Actions for Deepening Inclusiveness of India's Socio-Economic Development

Kishore Kumar Sutradhar¹, M. P. Bezbaruah² and Utpal Baishya³

Abstract

Affirmative action in India, enshrined in constitutional provisions, aims to redress caste-based inequalities by ensuring representation of Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs) in education, employment, and politics. Over seven decades, these policies have expanded access and promoted socio-economic mobility. Yet significant disparities persist. SCs and STs remain underrepresented in higher education and are disproportionately concentrated in lower-tier public employment, whereas OBCs show greater demographic convergence. Political reservations have enhanced inclusion, strengthening democratic representation. However, intra-group inequities, particularly the concentration of benefits among "creamy layers," limit the transformative potential of reservations. To address this, the study proposes a disadvantage-adjusted merit framework that moderates candidate scores by relative deprivation, enhancing equity within groups. The analysis underscores that while affirmative action remains essential for India's inclusive development, its effectiveness depends on recalibrating quota administration to prioritise the most disadvantaged.

Introduction

In 1947, as India attained political independence, it faced not only the monumental challenge of nation-building but also the urgent imperative of addressing deep-rooted social inequalities entrenched over centuries through the caste hierarchy. The Scheduled Castes (SCs) and Scheduled Tribes (STs)—officially recognised as "socially and educationally backward" communities—were among the most disadvantaged groups (Galanter, 1984; Mendelsohn and Vicziany, 1998). The persistence of caste-based disadvantage meant that these groups entered the postcolonial era with substantial deficits in education, employment, and political participation (National Sample Survey

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Office [NSSO], 2021; Sahoo et al., 2023). The Constitution of India, recognising the historical oppression of marginalised communities, institutionalised affirmative action through reservations in education, public employment, and political representation. Articles 15(4) and 16(4) empower the state to make “special provisions” for the advancement of socially and educationally backward classes, while Articles 330 and 332 reserve legislative seats for SCs and STs (Austin, 1999; Galanter, 1984). These constitutional measures were later extended to Other Backward Classes (OBCs) in 1990, following the recommendations of the Mandal Commission, resulting in a 27% reservation in central government services. The Supreme Court’s landmark judgment in *Indra Sawhney v. Union of India* (1992) upheld the OBC reservation but introduced the “creamy layer” exclusion, ensuring that socially and economically advanced members of OBCs would not benefit from these provisions. More recently, reservations were extended to the Economically Weaker Sections (EWS) of the population through the Constitutional Amendment Act. This amendment was upheld in *Janhit Abhiyan v. Union of India* (2022), wherein the Supreme Court endorsed economic criteria for affirmative action and accepted that the 50% ceiling on reservations could be exceeded under certain circumstances.

Given that SCs and STs have been the beneficiaries of affirmative action for over seven decades, it is both timely and necessary to assess the extent to which these policies have succeeded in narrowing socio-economic disparities. The present paper is motivated by this imperative, situating its inquiry within the historical, constitutional, and empirical debates on the effectiveness of India’s affirmative action framework. Specifically, it seeks to examine: (a) the extent to which the historical backlogs in socio-economic indicators for SCs and STs have been addressed through affirmative action, and (b) whether there is scope for reforming the implementation process of these policies to enhance their effectiveness.

Organised into five coherent sections, the paper begins with an introduction situating affirmative action in India within its historical and constitutional context while outlining the study’s central research objectives. The second section provides a comprehensive literature review, synthesizing existing scholarly debates on the efficacy, distributional outcomes, and criticisms of affirmative action policies. The third section details the materials and methods. The fourth section presents the results and discussion, empirically evaluating the implementation and impact of reservations across educational, employment, and political domains and culminating in the proposal of a disadvantage-adjusted merit score to enhance intra-group equity. Finally, the conclusion summarises the key findings and underscores the imperative for policy reforms aimed at deepening inclusiveness.

Literature Review

India has many endogamous caste groups, or *jatis*, spread across different parts of the country. People are born into diverse social and environmental circumstances, resulting in differences in social status, economic opportunities, political empowerment, and

educational achievements. In other words, individuals from all communities do not enjoy equal access to resources or opportunities to meet their needs. In the Indian context, people from various castes, communities, tribes, and religions often face discrimination and deprivation. The inequalities and discrimination along caste lines have been inherited for centuries (Dumont, 1980; Jodhka, 2017). Therefore; these less privileged groups in society must receive special support from the state so that they can enjoy equal opportunities and lead a life of dignity. Accordingly, some of these communities have been brought under affirmative action enshrined in the constitution of India after independence. These communities are categorised as Scheduled Caste (SC)⁴, Scheduled Tribes (ST)⁵ and Other Backward Classes (OBCs)⁶.

In this regard, various compensatory measures have been undertaken since the colonial period. One such effort is “Affirmative Action” (AA), which became more prominent after the adoption of the Indian Constitution in 1950. AA refers to a set of policies and practices designed to address historical discrimination and inequality by providing preferential treatment to historically disadvantaged groups. In India, AA is commonly known as the “Reservation Policy.” The Indian state grants reservations to different categories on various grounds. The reservation policy aims to ensure representation in education, employment, and politics for historically marginalised groups such as SC, ST, and OBCs. The primary purpose of introducing AA is to remove caste-based inequalities, bridge employment gaps for disadvantaged groups, ensure access to education for all, and redress the consequences of past injustices and systemic barriers.

The marginalised communities have been striving for inclusive development and have made some progress towards socio-economic integration into the mainstream of Indian society. To achieve this objective, the Affirmative Actions pursued by the government—enshrined in the Indian Constitution—have yielded positive results. AA fosters an

⁴ Initially SC community was categorised by various nomenclatures such as “Untouchables,” “Exterior Castes,” or “Depressed Classes.” the classification of SCs was formalised through a series of exercises starting with the nomenclature of Depressed Classes to describe disadvantaged groups by the British Colonial Administration. The term Scheduled Caste (SC) was first officially introduced by the Simon Commission (1927). The Simon Commission (the Indian Statutory Commission) introduced the phrase Scheduled Caste replacing commonly used terms like Depressed Classes, Exterior Caste and Untouchables. These terms were used to identify people that suffered from ritual pollution (not allowed to come in proximity of high-caste Hindu like the Brahmin) social disability (denial of access to centers of learning, temples, water sources) and economic disability (restriction from certain economic activities) and untouchability. These groups of people were included in a *schedule* for special political and educational protections.

⁵ In 1871 Criminal Tribes Act was passed by the Colonial Administration wherein some tribal groups were classified as “Criminal Tribes” based on the colonial belief that certain communities were hereditarily criminals. Under the Government of India Act 1935, certain tribal-dominated regions were designated as “Excluded” or “Partially Excluded” areas to be administered directly by Governors, theoretically to protect tribal culture. Later hill people inhabiting these excluded and partially excluded areas were all brought under the ST classification.

⁶ The classification of “Other Backward Classes” (OBCs) encompasses “Socially and Educationally Backward Classes” (SEBCs) who occupy middle tier in the caste hierarchy, historically disadvantaged but distinct from Scheduled Castes and Scheduled Tribes. The concept originated in the late 19th-century Madras and Mysore Presidencies to describe “Backward Communities” seeking representation. While Article 340 of the Constitution (1950) mandated the identification of these groups, a national list was not formalised until the Second Backward Classes Commission (Mandal Commission, 1979). Using 11 social, educational, and economic criteria, the Commission identified 3,743 castes as OBCs, recommending a 27% reservation in public employment. This was implemented in 1990 and upheld by the Supreme Court in the *Indra Sawhney* (1992) judgment, which also introduced the “creamy layer” to exclude affluent members from benefits.

environment of opportunity where individuals from Scheduled Castes, Scheduled Tribes, Other Backward Classes, weaker sections of society, women, minority groups, senior citizens, and persons with special needs can secure jobs or admissions that they might otherwise be denied. Beyond reducing caste-, race-, and class-based disparities, AA has contributed to increasing literacy rates, improving living standards, changing attitudes toward minority groups, and supporting the welfare of economically weaker sections (Pant and Choudhury, 2022).

These policies have brought positive changes to the lives of marginalised people. AA in public employment and higher education has not only compensated for historical discrimination but also promoted cross-ethnic interaction, fairness in recruitment and admissions, and greater social mobility. However, evidence suggests that inequality within these communities remains substantial. Data from various sources on material living standards, poverty rates, health status, educational attainment, and occupational outcomes indicate that disparities between SC-ST groups and non-OBC Unreserved (a loose proxy for upper castes) are persistent and systematic, despite regional variations (Deshpande, 2011; Deshpande and Newman, 2010). There is ample evidence documenting substantial gaps between SCs and Unreserved category in access to education, quality of education, and learning-enhancing resources, as well as active discrimination inside schools by teachers (Nambissan, 2020).

Deshpande (2011) rightly observes that all the existing AA programs and other supplementary measures need not be considered mutually exclusive. They can strengthen and reinforce each other. Admittedly, all these measures have costs, but the benefits of integrating large sections of nearly 160 million people from oppressed classes and unleashing the suppressed reservoir of talent is the need for the rapidly growing Indian economy. This observation raises the question of whether AA has been operating with considerable ineffectiveness or imperfections. The efficacy and fairness of these policies remain fiercely debated (Sowell, 2005; Kennedy, 2013). Analyzing quotas in India and the United States, Sander (2004) argues that affirmative action often fails to achieve its primary goal of raising the socioeconomic status of the targeted group due to limited scope or poor “matching” of recipients to opportunities, resulting in high failure rates and no lasting gains.

Similarly, some argue that the benefits of affirmative action are disproportionately concentrated among the socio-economic elite of the targeted group (Massey et al., 2006; Galanter, 1984; Sowell, 2005). Within disadvantaged communities, AA is alleged to have created a “Creamy Layer,” leading to inadequate trickle-down of its benefits. Multiple studies claim that real-world affirmative action programs often produce concentrated benefits for a few. Sowell (2005) noted that those individuals most likely to be compensated are often those with the least disadvantages, even when the groups they come from may suffer misfortunes. India’s programs, which extend benefits to large caste categories, have been criticised for disproportionately aiding richer subgroups within these categories (Deshpande and Yadav, 2006).

Given this, it is necessary to review how AA has evolved and functioned over the decades to recommend more effective implementation strategies in the future.

Materials and Methods

This study relies exclusively on secondary data sources. The datasets and reports consulted include the *Annual All India Survey on Higher Education Report*, the *Annual Report of the Ministry of Personnel, Public Grievances and Pensions*, the *Public Enterprise Survey*, the 61st and 68th rounds of the National Sample Survey Office (NSSO), and the *Fifth Labour Bureau Employment–Unemployment Survey Report*, and *Sixth Labour Bureau Employment–Unemployment Survey Report*. These sources were selected for their comprehensive coverage of socio-economic, educational, and employment indicators relevant to Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs).

To assess the effectiveness of Affirmative Action measures, standard descriptive statistical techniques—such as the computation of ratios, percentages, averages, and the use of visual representations (figures and graphs)—were applied. These methods facilitate both cross-sectional and temporal comparisons across social groups.

For the evaluation of potential reforms in quota administration aimed at enhancing intra-group equity, the study adapts a framework inspired by the Inequality-Adjusted Human Development Index (IHDI), as formulated by the United Nations Development Programme (UNDP). The Inequality Adjusted Human Development Index (IHDI) adjusts the Human Development Index (HDI) for inequality in the distribution of each dimension across the population. The IHDI accounts for inequalities in HDI dimensions by “discounting” average value according to its level of inequality. This approach allows for the adjustment of aggregate group outcomes to account for disparities within the beneficiary categories, thereby providing a more nuanced assessment of equity impacts.

Results and Discussions

The Implementation of Affirmative Action in India

Despite the importance of the question, it is quite challenging to assess the actual efficacy of AAs, the distribution of benefits within the targeted groups, and their spillover effects beyond the immediate beneficiaries. While AAs aim to create opportunities for the socio-economic upliftment of disadvantaged groups, it remains unclear whether these benefits truly reach the most underprivileged members within these communities.

In this section, we attempt to analyse how reservation policies and quotas have impacted the intended groups over the years. Specifically, we will examine the effectiveness of these policies in the educational, economic, and political domains.

Educational Domain

Higher education is considered a merit good, and therefore, it is the responsibility of the state to ensure its provision for all segments of society. In many countries, backward communities that have historically faced discrimination are granted preferential admission to colleges and universities through AA. In India as well, AA policies are directly applicable in higher educational institutions. The 93rd Amendment of the Constitution of India(2006)⁷ empowers the government to make special provisions for the admission of socially and educationally backward classes of citizens to educational institutions, including private institutions, whether aided or unaided by the government.

To assess the efficacy of AA in this regard, let us now turn to Figure 1. It is evident from the figure that the access to higher education is uneven with notable disparities in enrolment across social groups in India. It has been observed that students enrolled in higher education institutions in 2011-12, a total of 46.8 percent students were from reserved category (SC, ST and OBC) and the remaining 53.2 percent are from the unreserved category.

Figure 1: Category-Wise Shares in Enrollment for Higher Education 2011-12 to 2021-22



Source: Authors' compilation based on All India Survey on Higher Education (AISHE) reports (2011-12 to 2021-22), Ministry of Education, Government of India.

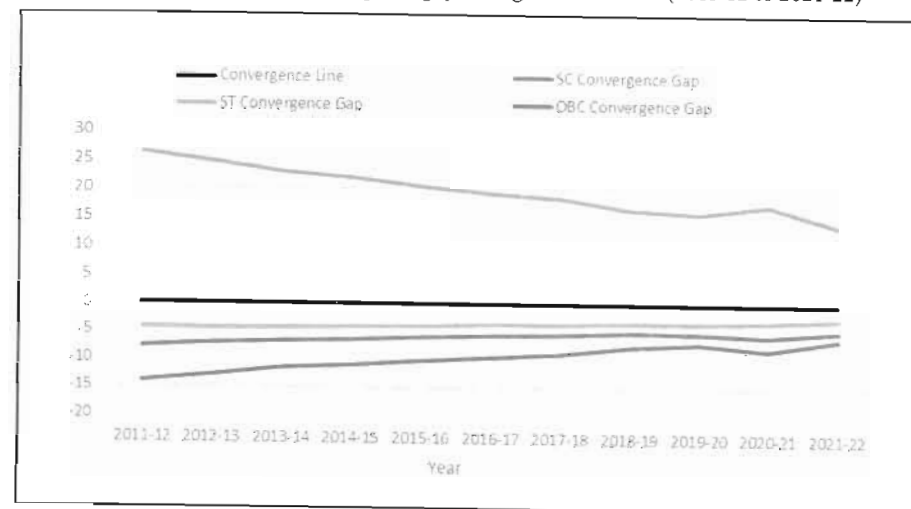
The corresponding share changed to 59.40 percent and 40.6 percent respectively in 2021-22. The enrolment rates in the ST category, however, have remained steady and below the reservation mark. As compared to all other social groups, the STs are lagging behind by almost 2.5 percent in enrolment in higher educational institutions, which is a

⁷ The 93rd Constitutional Amendment Act of 2005 in India added Clause (5) to Article 15, empowering the government to make special provisions for the advancement of socially and educationally backward classes (SEBCs), including Scheduled Castes (SCs) and Scheduled Tribes (STs), in all educational institutions, even private, unaided ones (except minority institutions), to ensure their access to education and implement reservations (like 27% for OBCs in central institutions). This was enacted to nullify the Supreme Court's ruling in the Inamdar case, which had struck down state-imposed reservations in private colleges, and to promote educational equity.

mark of their deficit in educational attainment. The OBCs, on the other hand, have fared better than their mandated limit of 27 percent. Moreover, it is a satisfactory sign that the representation of SCs has also been going up over the years. There has been an increase from 12.2 percent in 2011-12 to 15.3 percent in 2021-22. Consequently, the share of Unreserved category was 40.6% in 2021-22.

To gain an understanding of caste-wise enrolment in higher education vis-à-vis their demographic representation in the national population, the convergence gap of each category is illustrated in Figure 2. In Figure 2 the convergence gap between population share and enrolment in higher education share reveals continued disparities across social groups. Scheduled Castes (SCs) and Scheduled Tribes (STs) remain consistently under-represented, with their enrolment shares falling short of their demographic weight. Although the gap for SCs narrows slightly over the period, it remains significant, reflecting limited progress in equitable access. STs show a similar pattern with very little progress towards the convergence line.

Figure 2: Caste wise Convergence gap in Higher Education (2011-12 to 2021-22)



Source: Authors' compilation based on All India Survey on Higher Education (AISHE) reports (2011-12 to 2021-22), Census 2011 (Registrar General of India), and NSS 68th Round social group shares.

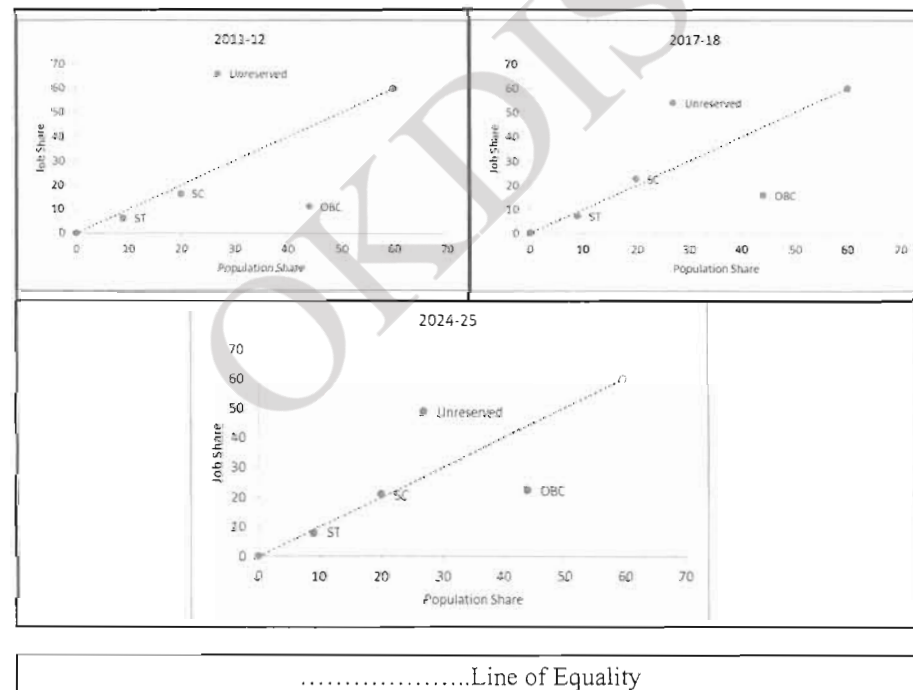
In contrast, Other Backward Classes (OBCs) display a sharper trend towards convergence, with their enrolment share steadily approaching their population share, indicating the relative success of the relevant affirmative action for this category. Correspondingly, the over representation of Unreserved category steadily decline. However, one needs to note that the unreserved category can technically and actually include some members of SC, ST and OBCs. A candidate belonging to SC/ST/OBC who is selected on the same standard as applied to general category candidates and who appears in the general merit list is treated as own merit candidate. Nonetheless the unreserved category comprises predominantly of members of groups unreserved

than SC, ST and OBCs. The important point to note here is that the gaps between the reserved and unreserved categories have tended to decline over time indicating a tendency towards convergence across category.

Public Employment

There are studies (Thorat and Attewell, 2007; Thorat and Neuman, 2012; Singhari and Madheswaran, 2016) to show that the marginalised and backward communities have been historically deprived of engaging in more reverbing employment. Therefore, to protect them from deprivation in employment, AA, in the form of a reservation policy, has operated in the employment domain. The validity of such a reservation is given under Article 16(4) of the Constitution by empowering the state to make “any provision for the reservation in appointment in favour of any backward class of citizens, and provision for the reservation to any class or classes of posts, in the services under the state in favour of the SCs and STs”. These reserved services are Government Civil Services, Statutory Bodies, Public Sector Undertakings and Semi-Government Bodies, and other bodies under the administrative control of the government.

Figure 3: Caste-wise Population share Versus Job share in Central Government Services in Percentage



Source: Ministry of Personnel, Public Grievances and Pensions, Annual Report-2011-12, 2017-18, and 2024-25; Census 2011 (Registrar General of India), and NSS 68th Round social group shares.

The success of the component of affirmative action in the form of reservation of jobs in the central government can be seen in our illustrations in figure 3. The top panel relating to 2011-12, it can be seen that the SC and ST communities have been able to secure job shares which are almost equal to their population shares. In contrast, the job share of OBCs is far less than their population share, whereas the job shares of the unreserved is far in excess of their population share. It may be noted here that SCs and STs have been beneficiaries of the reservation policy almost right from 1951, which apparently has contributed to these communities securing job shares equal to their population shares.

It is worth noting that OBCs have started getting the benefit of job reservation only in the 1990s and they were still a long distance to go to secure job shares which are proportional to their population shares. Now, if we move to panel below relating to the years 2017-18 and 2024-25, it can be seen that SCs in the meantime had been able to get a job share which is marginally above their population share. STs have also marginally improved their job shares, but their job share is still slightly less than their population share.

On the other hand, OBCs have significantly improved their job shares since 2011-12, and job share of Unreserved category have steadily been substantially decline. Though the share still far exceeds their population share. So, one can see that over time the job reservation policy has succeeded in a progress towards convergence of job shares of communities to their population shares. While this can be hailed as a success of the affirmative action, it is worth noting that the representation of SCs and STs has been primarily in lower category jobs, whereas their representation in higher category jobs continues to be much smaller. This has been illustrated in the next set of diagrams.

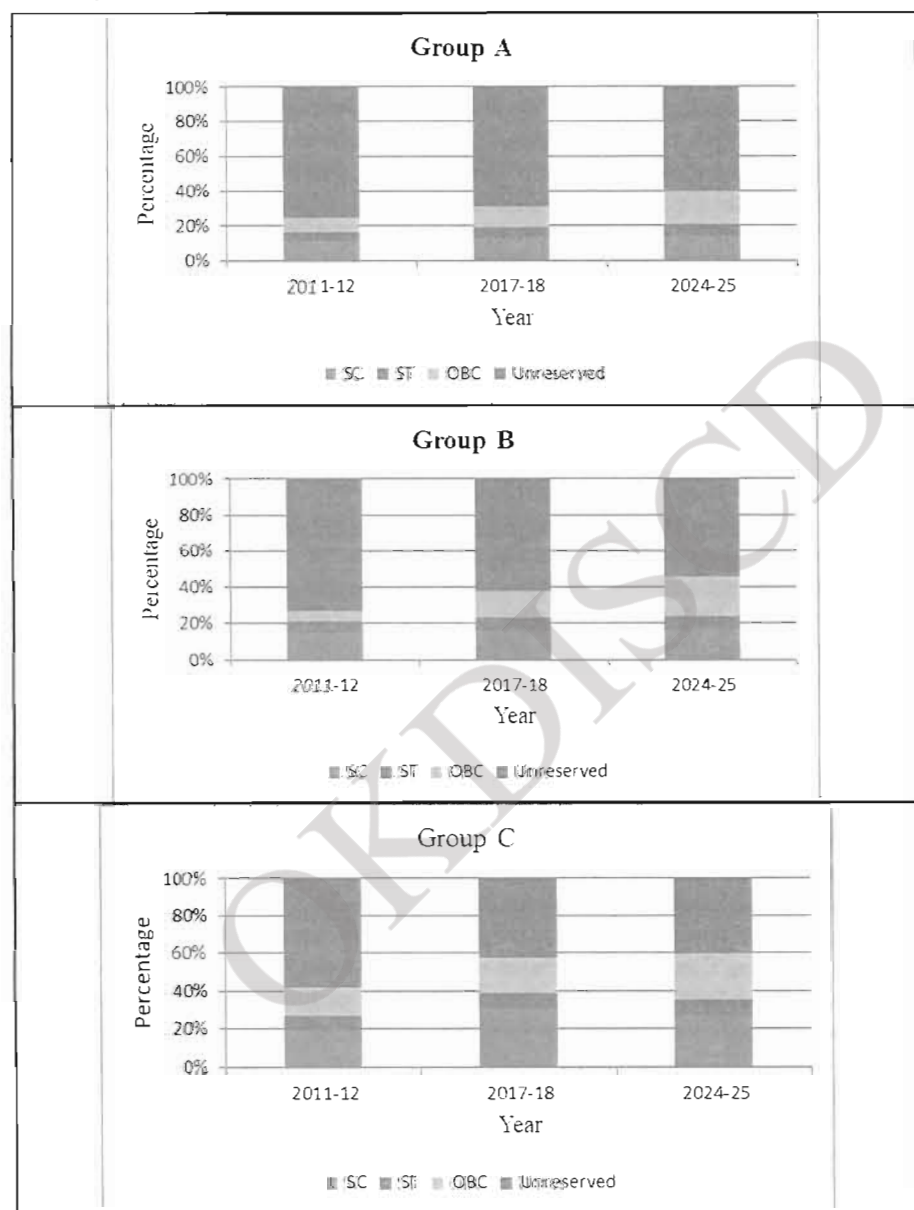
If we compare the three panels of figure 4, it is abundantly clear that the representation of SC and STs is relatively less in Group A⁸ and even Group B⁹ jobs. Their combine share has improved only marginally over the years in these two layers of employment. The presence of these two categories in Group C¹⁰ job is visibly higher. The share of SC in the Group C jobs had a discernible increased in 2017-18 from 2011-12. By 2024-25, though, the share declines somewhat. It is worth mentioning that in 2011-12 and 2017-18, Group C and Group D were reported separately; however, in 2024-25 these categories have been merged into Group C, while sanitation workers (earlier part of Group D) treated as a separate category. For comparability, Group C and Group D for 2011-12 and 2017-18 have been combined as Group C, and for 2024-25, Group C also includes sanitation workers for the present purpose.

⁸ Group A posts are the highest level in the government administrative structure, involving policy-making, decision-making, and overall administration. Officers are typically recruited through UPSC and hold gazetted status. Examples include IAS, IPS, IFS officers, and senior positions such as Directors and Professors.

⁹ Group B posts are middle-level positions involving supervision and implementation of government policies under Group A officers. Recruitment is generally through SSC, State agencies, or departmental promotion, and these posts may be gazetted or non-gazetted. Examples include Section Officers, Inspectors (Income Tax/GST), and Sub-Inspectors.

¹⁰ Group C posts comprise lower-level administrative and operational positions involving routine clerical, technical, and support functions, and are generally non-gazetted with recruitment through SSC or departmental processes. Following administrative reforms, Group C now includes the earlier Group C and most Group D posts, while sanitation workers are treated separately. Examples include clerks, assistants, technicians, multi-tasking staff, and earlier Group D roles such as peons, watchmen, and helpers.

Figure 4: Caste-Wise Distribution of Employees in Central Government Services



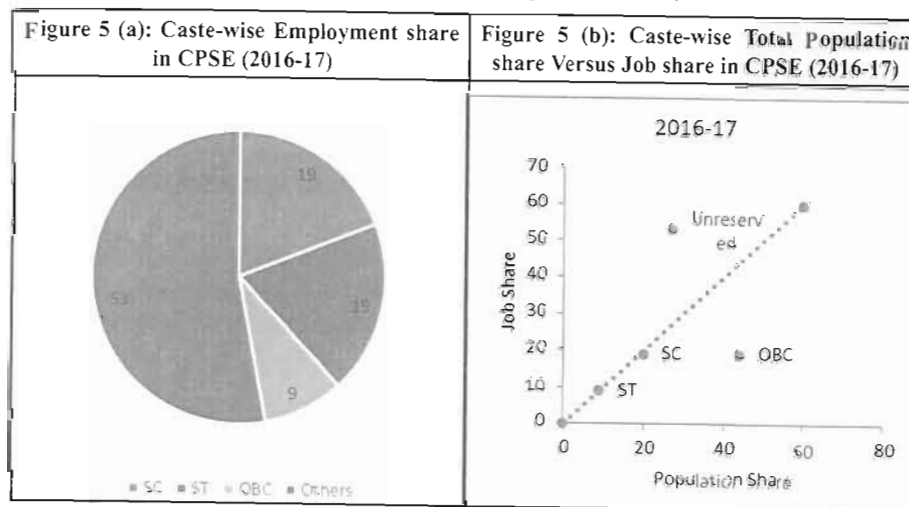
Source: Annual report of ministry of personnel, public grievances and pensions 2011-12, 2017-18 and 2024-25

It is clear from Figure 4 that despite shrinking of share of the unreserved category in Central Government services, this category still holds a more than a fair share, especially in group A jobs. On the other hand, improvements in the shares of

disadvantaged categories, particularly of SC and ST, have been painfully slow. As for OBC, improvements in shares of all category of jobs have been somewhat better than those of SC and ST. Indeed, for the combined Group C category (including sanitation workers), the quota of 27% for OBCs is almost fulfilled by the year 2024-25. But OBC's estimated population share being 41%, which is much in excess of job quota of 27% for the category, the backlog for the community persists even in its share of the combined Group C category job.

Offering a lens into the broader dynamics of inclusion and social equity within public sector employment, Figure 5(a) reveals significant disparities in workforce composition within Central Public Sector Enterprises (CPSEs). Scheduled Castes (SC), Scheduled Tribes (ST), and Other Backward Classes (OBC) constitute 19%, 9%, and 19% of employees, respectively, while the 'Unreserved' category accounts for 53%, indicating an uneven distribution. Figure 5(b) presents the comparison between population share and job share across categories. The job shares of SC and ST largely correspond to their population proportions, whereas the OBC category exhibits a noticeable gap, and the 'Unreserved' category has a job share exceeding its population share. While these trends reflect partial success of affirmative action policies, SC and ST employees remain predominantly in lower-tier positions, with limited representation in higher-level jobs—a pattern further illustrated in the following diagrams.

Figure 5: Caste-wise Employment Share and Caste wise Population-Job Share Comparison in Central Public Sector Enterprises (2016-17)



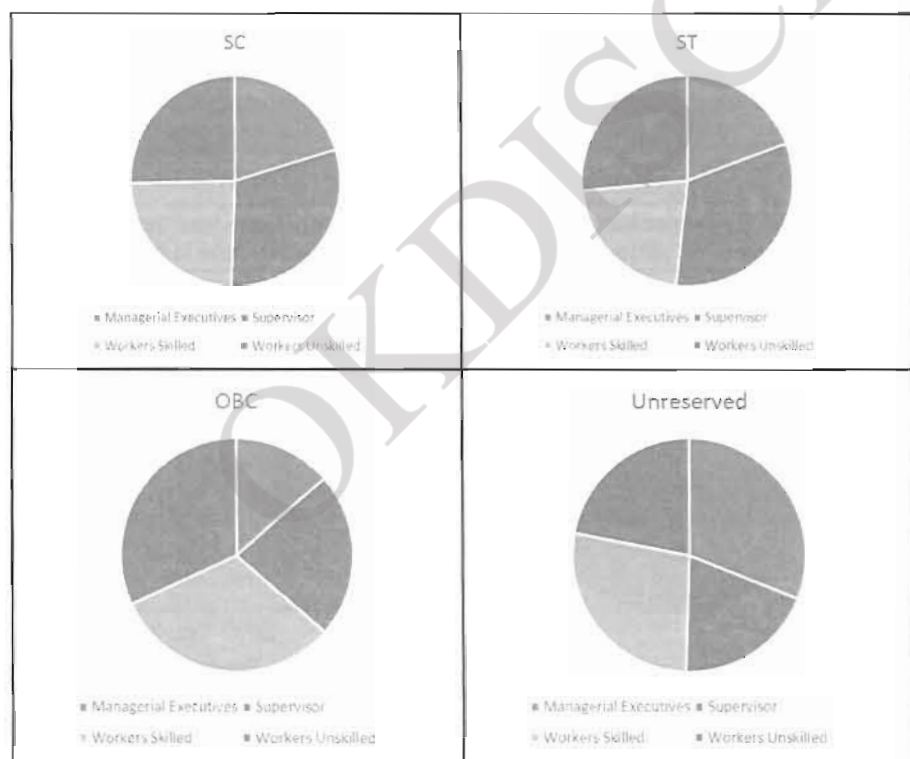
Source: Public Sector Enterprise Survey, 2016-17; Census 2011; Census 2011; Projection from NSS 68th Round

The pie charts (Figure 6) further reveal that SC and ST employees are predominantly concentrated in low-paid job, with minimal representation in managerial and executive positions. This trend suggests that affirmative action policies have had limited success in promoting upward mobility for these groups.

In contrast, the OBC group shows a more balanced distribution across various job categories, including managerial, skilled, and unskilled roles. Although they still have a substantial share in unskilled positions, their relatively higher representation in managerial and skilled jobs reflects better overall access to higher-paying roles. The “Unreserved” category, representing employees from general castes, displays a more even distribution, with the largest share in managerial positions, followed by significant representation in low paid jobs. This analysis underscores the ongoing challenges in achieving equitable caste representation in higher job categories within CPSE.

In a similar fashion, when we look at the representation of different social groups in teaching and non-teaching staff in higher educational institutions, as presented in Figure 6. It reveals significant disparities in representation among different social groups. As illustrated in the figures, individuals from the Scheduled Castes (SC) constitute only 7.5% of teaching staff, whereas their representation in non-teaching roles rises to 12.9%.

Figure 6: Job category wise Distribution of Employment of Caste group Employment Composition in Central Public Sector Enterprises (2016-17)

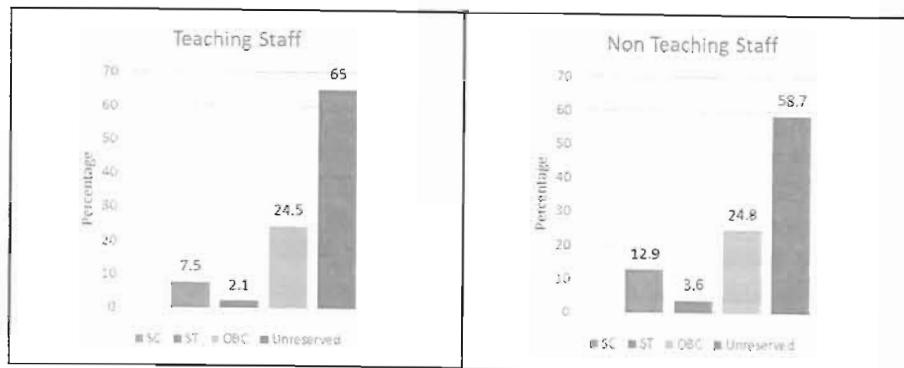


Source: Public Sector Enterprise Survey, 2016-17

If we compare representation of caste category across teaching and non-teaching staff in the institute of higher education a similar pattern is observed (Refer figure 7). The figures point to a persistent under representation of SC and ST communities in academic

roles, which are typically associated with higher status and influence within institutions. Scheduled Tribes (ST) for instance, make up just 2.1% of teaching staff compared to 3.6% in non-teaching positions. In contrast, representation of Other Backward Classes (OBC) is relatively consistent across both categories—24.5% in teaching and 24.8% in non-teaching positions—indicating more equitable access for this group. The unreserved category continues to dominate, particularly in teaching positions, accounting for 65% of the total, compared to 58.7% in non-teaching roles.

Figure 7: Representation of Different Caste Groups in Teaching and Non-Teaching Staff in Higher Education (2015-16)



Source: All-India Survey in Higher Education Report, MHRD, 2015-16

From the above illustration it can be concluded that while the AA have had positive impact in helping historically disadvantaged communities to secure higher shares in higher education and public sector employment, implementation of the prevailing reservation policies requires further sharpening for greater delivery of social justice in this regard. The 13th Report Committee on Welfare of Other Backward Classes, 2024 explains how job secured on own merit by OBC candidates are added with those selected under quota to show the OBC quota to have been fulfilled. From the 25th Report of Parliamentary Committee on the Welfare of Scheduled Castes and Scheduled Tribes, 2024 it can be understood that the issue of backlog vacancies in SC and ST and question of ‘not found suitable’ is a major concern.

Political Domain

Historical injustices to marginalised communities in political spheres have compelled the Indian state to adopt political reservation to ensure adequate representation in political system. Political reservation has therefore, become a primary means of inclusion and redistribution of political resources in favour of those marginalised communities. The one arena in which quotas have been implemented 100 percent is the sphere of political reservation (Deshpande, 2010). The reservation for the SC, ST communities in the Lok Sabha has existed for seven decades. As per the Delimitation of Parliamentary and Assembly Constituencies Order of 1976 (79 for SCs and 41 for STs) and of Order 2008 (84 for SCs and 47 for STs) seats were reserved under different Parliamentary elections.

The following table-1 presents and election-wise representation of SC/ST communities in different Lok Sabha elections.

The Table 1 shows an election-wise representation of social groups in Lok Sabha. From the data it is evident that the representation of social groups was relatively higher than their prescribed seats. One probable reason for grate success of reservation policies in this context is that unlike educational institutions and employment, there are no stringent qualifying standards to compete the election, therefore this result is expected. This could be due to the practice of double-member Constituencies, whereby many SC/ST candidates were elected from unreserved seats (Prasad, 2001; Weiner and Field, 1975). The reservation system has enabled the Indian democratic practices to become 'Politically Inclusive' by accommodating the marginalised under its ambit. Thus the provision of political reservation is an important instrument of social change.

Table 1: Seats reserved and Won by SC/ST for Lok Sabha over the year 1951-2019

Year	SC		ST	
	Seats reserved	Seats Won	Seats reserved	Seats Won
1951	72	76	23	38
1980	79	87	41	43
1998	79	80	41	49
2004	79	79	41	41
2019	84	86	47	52

Source: Statistical Reports of the General Election to Lok Sabha, India

Thus, despite debate over this issue, our analysis reveals that the AA is an important machinery of the Indian Constitution for ensuring equality in education, employment, and the legislature for the weaker section. However, while the Affirmative Actions have helped the traditionally backward communities to get more representation in government jobs, the representation of such communities in lower-paid jobs is more visible than their positions in higher position or higher-paid jobs. This implies that such communities, by and large, have not been able to break the glass ceiling for getting into the higher-paid jobs. For the efficacy of Affirmative Action, it is required that the affirmative policies are so reformed as to enable, especially the disadvantaged section within the disadvantaged communities, to take advantage of such action. For correction in this direction, we recommend (in the following section) that the facilities within the Affirmative Action be distributed among the members of a particular community by taking into account not only the basic criteria such as marks, but also moderating basic criteria by the extent of disadvantage of the households. Towards this end, we have proposed a disadvantaged-adjusted merit score calculation for the allocation of opportunities under Affirmative Action among the different households of a given community.

Towards Reforming the Quota Administration for Greater Intra-Group Equity

Discussion in the preceding section leads us to the conclusion that affirmative actions have been considerably successful in ensuring the marginalised a fair chance to have access to education and jobs. These communities now have better access to higher education, and government jobs, and have been able to break the curse imposed by marginality, caste prejudice, and poverty to a significant extent. Yet, elimination of age-old relative disadvantages of these communities is still an unfinished agenda.

One of the drawbacks of the existing reservation policies is that all members of a community for which the reservation provisions are there, are equally qualified to claim the benefits of reservations. This ignores the fact that there are wide disparities or unequal improvement within the SCs, ST and the OBCs. There are evidences (Deol, 2023; Gupta, 2024) of evidence highlighting how disproportionate access to the benefits of reservation manufactured inequalities within the communities. B. R. Gavai, former Chief Justice of India, observed that internal disparities within the Scheduled Caste community necessitate sub-classification to ensure that reservation benefits reach its most disadvantaged members (Indian Express, 2025). Hasan and Bezbaruah (2023) found that the level of income inequality is highest within the ST and has increased between the periods 2004-05 to 2011-12. This implies that the reservation system has led to the emergence of an "advanced" section among the caste groups who reap the larger share of benefits from the reservation. This advanced section of people is technically called the 'creamy layer'. Thus, creamy layer refers to some members of a backward class who are socially, economically, as well as educationally advanced as compared to the rest of the members of that community (Prasad, et. al., 1993). Therefore, some argue to exclude the creamy layer section of a particular backward class from their access to the Government's affirmative action. On September 26, 2018, a five-judge Constitution Bench delivered a verdict in Jarnail Singh vs Lachhmi Narain Gupta case calling that Equality will not be possible if only the creamy layer within that class bags all the coveted jobs in the public sector and perpetuate themselves, leaving the rest of the class as backward as they always were. Thus, it is necessary to put in structures within the quotas so that the benefits of affirmative actions are equitably distributed within a community. This can be implemented in the allocation of quota seats for educational purposes or the distribution of job vacancies under quota.

This will require the calculation of the relative disadvantage index score for each member or applicant for a seat or post. For ease of implementation, this index should include only a few easily verifiable factors. With an appropriate formula, we can get an index that will tend towards 1 for greater relative disadvantage and towards 0 with lower relative disadvantage. So if we denote the index as D, the value will increase away from 0 towards 1 for candidates with greater relative disadvantage

Next, it will be necessary to moderate the mark/score secured by a candidate seeking quota seat by using the disadvantaged index. Thus, if the mark/score originally secured is M, the disadvantage-adjusted mark/score AM will be

$$AM = M \times D$$

For illustration, let us take a hypothetical example. Suppose we take the following three observable indicators of the disadvantaged of a person —

D_1 = whether the person is first generation aspirant for a reservation. $D_1=1$ for first-generation aspirants but $D_1=0$ for those whose parents have already availed the reservation benefit.

D_2 = whether the person is from an urban area or a rural area. There are studies to show that the disadvantage of SCs/STs has been more in rural areas than in urban areas (Hasan and Bezbaruah, 2023).

Thus $D_2=1$ for a person who lives in a rural area. And $D_2=0$, for a person who lives in an urban area.

$D_3=D_3$, may be an indicator of the economic status of the household to which the person belongs.

It may be more elaborately defined, taking into account several observable and easily verifiable indicators. To keep it simple, we may take possession of a motor vehicle (a four-wheeler used not for commercial purposes). $D_3=1$, if the person's household doesn't own a motor vehicle. $D_3=0$, for those who possess a motor vehicle.

For the time being, let us limit ourselves to these three indicators only. Thus, we may define the index of relative disadvantage as

$$D = \frac{D_1 + D_2 + D_3}{3}$$

However, there may be a problem with the above formula for the disadvantaged index. If D_1 , D_2 , and D_3 are equal to 0 (zero), then D will also be zero. This will make the disadvantage-adjusted mark/score AM equal to 0 (zero).

To avoid this pitfall, we may add another component D_4 to our index.

$D_4=1$ if the person belongs to the community in question.

$D_4=0$ if the person does not belong to the community in question. Thus, after the revision,

$$D = \frac{D_1 + D_2 + D_3 + D_4}{4}$$

Now, $0 < D \leq 1$

Hypothetical Illustration 1

Let there be two candidates with 60% score each for a single seat. Let the indices for the two candidates be as follows:

Indicators	Candidate-1	Candidate-2
D_4	1	1
D_1	0	1
D_2	0	1
D_3	1	1

Then, by formula 5.2, the value of D for candidate-1 will be or 0.5.

Similarly, for candidate-2, D will be equal to 1.

Then, the *disadvantage adjusted score (AM)* will be:

$$60 \times \frac{1}{2} = 30 \text{ for candidate-1; and}$$

$$60 \times 1 = 60 \text{ for candidate-2.}$$

As the disadvantage adjusted score for candidate-2 is greater than candidate-1, hence candidate-2 should get the seat. Here, though both candidates have the same score, seat goes to candidate-2 because of the candidate's greater disadvantage.

Hypothetical Illustration 2

Let the candidate 1 score 76% marks and candidate-2 score 65% marks for a single seat. Then the indices for the two candidates are as follows:

Indicators	Candidate-1	Candidate-2
D_4	1	1
D_1	1	1
D_2	0	1
D_3	1	1

Then, the value of D for candidate-1 will be $\frac{3}{4}$ or 0.75.

Similarly, for candidate-2, D will be equal to 1.

Then, the *disadvantage-adjusted score (AM)* will be: $76 \times \frac{3}{4}$ for candidate-1; and

$$65 \times 1 = 65 \text{ for candidate-2.}$$

Hence, the candidate-2 should get the seat. This time also the second candidate gets the seat despite having a lower score than candidate -1. This is because of two factors – disadvantage of candidate-2 is taken into account at a compensation for disadvantage makes up for the candidates lower score. It is worth noting that if the differences in score tend to increase at some point compensation for disadvantage cannot make up for the deficit in score. This is illustrated in third hypothetical illustration.

Hypothetical Illustration 3

Let the candidate-1 score 80 % marks and candidate-2 score 50% marks for a single seat. And the indices for the two candidates are as follows:

Indicators	Candidate-1	Candidate-2
D_4	1	1
D_1	0	1
D_2	0	1
D_3	1	0

Then, the value of D for candidate-1 will be $\frac{1}{2}$ or 0.50

Similarly, for candidate-2, D will be equal to $\frac{3}{4}$ or 0.75

Then, the *disadvantage adjusted score (AM)* will be:

$$80 \times \frac{1}{2} = 40 \text{ for candidate-1; and}$$

$$50 \times \frac{3}{4} = 37.5 \text{ for candidate-2.}$$

Hence, the Candidate 1 should get the seat. As stated above the score gap between the candidate 1 and 2 in this case is too large to compensate for relative disadvantage of candidate 2.

The three illustrations given above shows not only how relative disadvantage of candidate can be compensated in the selection process without completely ignoring merit in the selection criteria.

This is merely a suggestion to show in which direction the system can be modified. Actual modification will require a detailed specification of the disadvantaged index and also the extent of adjustment for disadvantage.

Conclusion

While Affirmative Actions have been found to have contributed to socioeconomic upliftment of communities in SC, ST and OBC lists, there are some question marks on the equitability of distribution of quota for education and jobs within the specific groups. For greater intra-group equity in the distribution of benefits of quota, it is recommended that the criteria for allocation of quota seats for a group be revised. It is advocated that the basic marks, which are currently used for filling quota seats for a group, be first adjusted for the different levels of disadvantages of the different candidates. This process would increase the mark of the more disadvantaged candidate and moderate the mark of the less disadvantaged candidate. The allocation of quota seats for any given group of communities should then be allocated based on the disadvantaged adjusted mark. This would ensure greater equity in the allocation of quota seats for a given group. Hence, for improving the inclusiveness of India's development process, special modified policy initiatives as recommended, targeting the communities that have lagged behind the rest of the country in development outcomes, should be intensified.

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Maternal Healthcare in the Indian Himalayan Region: Evidence from NFHS-5, 2019-21

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Abstract

Quality and adequate maternal healthcare services are crucial to reduce the risks of maternal deaths. Utilising National Family Health Survey (NFHS)-5 data (2019-21), this study presents an analysis of maternal healthcare use in a geopolitically strategic mountainous Himalayan region of India. Using descriptive statistics and multivariate procedures, we observe poor utilisation of several maternal healthcare services in the region. Logistic regressions show that, adjusting for other factors, women in the region are more likely to complete at least 4 antenatal care (ANC) visits but are less likely to have at least 100 days of Iron & Folic Acid (IFA) intake, choose institutional childbirths, use full antenatal care services (full ANC), or to receive adequate quality antenatal care (AQC), compared with their counterparts in the rest of India. Intra-region disparities remain glaring, and utilisation is determined by various factors. Findings suggest measures to address the diverse concerns in maternal healthcare access and use in the region. Long term measures are need to improve the overall performance, but, as short term solution, priority may be given to the more vulnerable population sub-groups. Studies on medico-clinical quality of care, especially in the present contexts of high maternal mortality risks, hold paramount importance in the region.

Introduction

Maternal deaths remain a global public health concern. An estimated 287,000 maternal deaths occurred globally in 2020, with such incidences mostly reported from the low and lower middle-income countries (WHO, 2023). During 1990s, with a substantially high maternal mortality ratio (MMR) of 556, in India, about 138,000 women died every year due to pregnancy and childbirth related complications. Between 1997 and 2020, there were estimated 1.3 million maternal deaths in the country (Meh et al., 2022). MMR in India has declined nevertheless, and as per the latest Sample Registration System (SRS) report, it stood at 97 per 100,000 live births during 2018-20. Meh et al. (2022) similarly estimate a decline in MMR, by about 70% from 398 in 1997-98 to only 99 per 100,000

live births in 2020. India thus achieved its National Health Policy (NHP), 2017 target MMR of less than 100, but the figure continues to remain well above the Sustainable Development Goal (SDG) target of 70 maternal deaths per 100,000 live births. MMR also varies widely across states/UTs in India, and it remains markedly high in a few, warranting examinations of maternal healthcare use, care quality and its adequacy at least in certain regions of the country.

Restricted to the mountainous Indian Himalayan Region (IHR, hereafter), this study covers the states/UTs of Jammu & Kashmir, Ladakh, Himachal Pradesh, Uttarakhand, Sikkim, Arunachal Pradesh, Nagaland, Mizoram, Manipur, Meghalaya and Tripura (Figure 1), but excludes the states of Assam and West Bengal, which predominantly comprise plain areas. Bordered with Pakistan on the northwest, the People's Republic of China, Bhutan and Nepal on the north, and Myanmar and Bangladesh on the south, the Himalayan region with distinct topography holds profound geopolitical and strategic importance for India. This region, despite being sparsely populated, is socio-culturally diverse, and economically, it is recovering from sluggishness. Previously, the sample states/UTs were granted the status of Special Category States (SCS), and, as reiterated by the Thirteenth Finance Commission of India, their development impediments stem mostly from physical geography, sparse terrains, remoteness and their histories (Bhattacharjee, 2014). On health domains, excepting Tripura and Mizoram, all other States/UTs in the region were accorded 'achiever' or 'aspirant' category status, having the lower performance index (NITI Aayog, 2021). The situation for maternal health, as would be stated soon, is worrying as well. In terms of health infrastructures, while the population pressure per health facility tends to be low, average distance to health facilities remains concerning, particularly in view of difficult and mountainous terrains in the region. For most states/UTs, the average radial distance to health facility, according to the *Rural Health Statistics* (2021-22), is higher than the national average. For instance, barring Tripura, the average radial distance to a Sub-Centre in all other states/UTs is larger than the national average of 2.49 KMs. Similar is the scenario observed for Primary Health Centre (PHC), with the average radial distance varying from 5.45 KMs in Tripura to 24.25 KMs in Ladakh against the national average of 6.28 KMs. For Community Health Centre (CHC), it varies from 12.37 KMs in Tripura to 51.85 KMs in Ladakh, compared to the all India average of 13.39 KMs. The average rural area covered under each health facility is also larger in the region. Comprehensive discussions on health and healthcare, in such contexts, are necessary as well as worth undertaking. Many areas on the subject remain under-researched, the present analysis concentrates on utilisation of maternal care services in this geographically challenged region of India. In this region, the risks of maternal deaths remain evidently high, at least relative to the SDG-3.1 target, and as compared with many other states/UTs in India. For instance, based on the Health Management Information System (HMIS) data for 2017-19, Goli et al. (2022) estimate an MMR of 284 for Arunachal Pradesh, followed by Manipur (282), Meghalaya (266), Sikkim (228), Jammu and Kashmir (151), Nagaland (143), Himachal Pradesh (127), Mizoram (131), Tripura (119) and Uttarakhand (107), against the national average of 122 and the SDG target of 70. These facts rationalise discussions on critical aspects of maternal healthcare in the region.

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There exists extensive literature on maternal healthcare use in India. Some studies on the subject can be found in the region as well (e.g. Cáceres et al., 2023; Kumar et al., 2022; Bora et al., 2022; Kaur, 2023; Saxena et al., 2020; Prochaska et al., 2016; Apum & Nochi, 2017; Nienu & Longkumer, 2015), offering valuable insights on certain aspects of maternal healthcare in the region. However, these studies mostly rely on small samples and are usually limited in their scope or geographical coverage. More recently, a comprehensive discussion was presented by Mustafa and Shekhar (2021), using data from NFHS-4 (2015-16). However, the study, examining certain specific maternal care components, missed out on two crucial composite indicators – ‘full antenatal care services (full ANC)’ and ‘adequate quality antenatal care (AQC)’. Determinants of maternal healthcare use in the region similarly remain less understood. The paper tries to bridge some of these gaps, by presenting an analysis of utilisation of maternal healthcare services in this mountainous region. More specifically, the questions raised are: (a) what is the current state of maternal healthcare use in the region? (b) How does the region compare to the national level attainments, or with its counterpart rest of India? , and (c) What are the determinants of maternal healthcare use in the region?. Utilising data from NFHS-5 (2019-21), this study observes a poor attainment in several maternal healthcare use indicators in the region – in absolute term, as well as in comparison to the national level performance or with its counterpart rest of India. Intra-region disparity remains glaring and utilisation is determined by various factors.

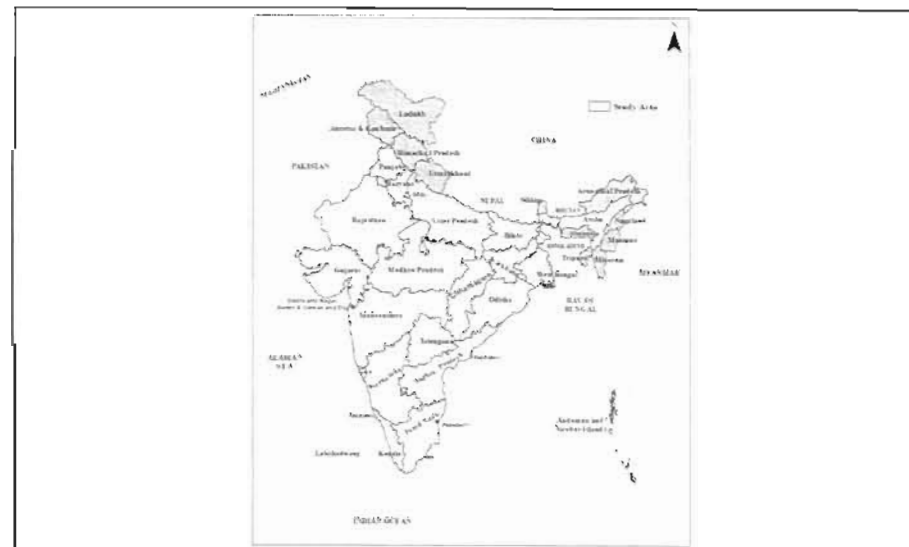
The rest of the article is structured as follows. Section 2 describes the data and methods of the study, followed by results in Section 3 and their discussion in Section 4. We then conclude the study with Section 5, highlighting the key findings, policy implications and identifying a few areas for future studies.

Materials and Methods

Data

The study utilises National Family Health Survey (NFHS)-5 data collected by the International Institute for Population Sciences (IIPS), Mumbai, under the aegis of the Ministry of Health and Family Welfare (MoHFW), Government of India (GOI). The survey, carried out during June 17, 2019 - April 30, 2021, collected information on several aspects, including maternal healthcare use for the live births during the preceding five years. In the survey, 724115 women, aged 15-49, were sampled, recording a total of 232,930 live births. For this study, however, we consider only the most recent live births, giving a sample size of 176,843 for India overall, and 28691 for the IHR – the present study area. The sample distribution in the region is as follows – Jammu & Kashmir (4898), Himachal Pradesh (2145), Uttarakhand (2966), Sikkim (569), Arunachal Pradesh (4570), Nagaland (2205), Meghalaya (4602), Mizoram (1896), Manipur (2511), Tripura (1860) and Ladakh (469) (Figure 1).

Figure 1: Study Area



Source: Authors

Variables and Measurements

Delimited to utilisation of ‘antenatal care services’ and ‘childbirths’, a range of outcome variables are used for analysis. Two of them need to be defined explicitly - full antenatal care services (full ANC) and adequate quality antenatal care (AQC). Following Singh et al. (2023), we define full ANC to include ‘four or more ANC visits’, ‘two or more TT injections’ and ‘IFA intake for 100 days or more’. Similarly, a woman is considered to have received adequate quality antenatal care (AQC) if she reported receiving antenatal care components including (a) weight measurement (b) blood pressure measurement (c) blood sample tests (d) urine test (e) two or more doses of TT injections, (f) IFA intake for 100 days or more, and (g) abdomen test. The previous studies tend to consider items from (b) to (f) (e.g. Gintara et al., 2023), but, in present context definition of AQC, we include the items in (a) and (g) as well, at least for two reasons: one, mother’s body weight serves as an indicator for her own health as well as growth of the fetus, and; two, abdomen screening is essential to estimate gestational age, fetal anomalies or multiple pregnancies. The predictor variables, described in Table 1, are largely identified from the literature, and their selection is guided by healthcare access models or frameworks (Andersen, 1968; Levesque et al., 2013).

Analytical Framework

Descriptive statistics and multivariate procedures are used for analysis. First, a description of utilisation of maternal care services is presented –by states/UTs and women’s socioeconomic profiles – to provide an understanding of its current state in the region. Regression analysis are then carried out to identify the determinants of maternal healthcare use in the region, and to estimate the odds ratios for use of such services in

the region vis-à-vis the rest of India. In all estimations, the Demographic and Health Surveys (DHS) data analysis guidelines have been followed, and unless otherwise stated, sample weights are used and the survey design accounted for.

Empirical Specification

The outcome variables, defined as binary in their measurement, are coded 1 or 0, with the former indicating use of a given maternal healthcare service, while the latter the otherwise. For multivariate analysis, logistic regressions are performed – a widely used procedure preferred due to its simplicity and ease of interpretation. To put the procedure formally, assume -

$$y_i^* = x_i'\beta + u_i \text{-----}(1)$$

where, y_i^* is a latent continuous variable, linked to observed discrete y_i such that $y_i = 1$ if $y_i^* > 0$; $y_i = 0$ otherwise $x_i' = [x_{i1}, x_{i2}, \dots, x_{ik}]'$ is a vector of predictor variables; β is vector of parameters to be estimated; u_i is error term assumed to follow logistic distribution.

Logistic regression models the log odds of the probability of occurrence of an event to that of non-occurrence as a linear function of the independent variables.

$$\text{Logit} = \ln \frac{p(y_i = 1)}{p(y_i = 0)} = x_i'\beta \text{-----}(2)$$

Solving (1) and (2) gives

$$p(x; \beta) = \frac{e^{x_i'\beta}}{1 + e^{x_i'\beta}} = \frac{1}{1 + e^{-x_i'\beta}}$$

Empirically, in this contexts, the probability of a woman using a given maternal care service is given by-

$$p(\text{use of maternal care services}) = 1 / (1 + e^{-x_i'\beta}) = 1 / (1 + e^{-z_i})$$

Regressions are carried out for utilisation of *specific* care services such as 'at least 4 ANC visits', 'at least 100 days of IFA intake', '2 or more doses of TT injection before birth', and 'institutional delivery' as well as for two *composite* indicators – 'full ANC use' and 'receipt of AQC'. Two sets of empirical specifications are employed—one, for the full survey sample, with *dummy* for the IHR (N=176843) and the other on sub-sample data for the study area (N=28691). The first set of specifications is used to estimate the odds for women's use of maternal healthcare services in the IHR vis-à-vis the rest of India, while the latter to identify its determinants within the region. For the first, step-wise regression is followed, starting with the predictor variable *IHR* to

examine its bivariate association with maternal healthcare use, and then adding the other control variables in order of their presentation. In the procedure, no significant changes could be observed, at least qualitatively, in coefficient estimates for the variable of interest, Probit estimations are additionally performed as a check of robustness of the reported results, and sub-sample regressions are carried out (on 50% sub-sample data) to check the sensitivity of the results to sampling variations. The alternative procedures produced estimates consistent with the reported results.

Table 1: Description of the predictor variables

Variables	Definition/Description	Unweighted IHR sample(%) N=28691
IHR	Dummy for the study area (Ref. Rest of India)	-
Birth order	Most recent live birth order(Ref. 1st Birth)	34.91a
2-3	=1 if birth order is 2 or 3; 0 otherwise	48.49
4 or more	=1 if birth order is 4 or higher; 0 otherwise	16.60
Education	Highest level of education completed (Ref. No schooling)	14.85a
Primary	=1 if completed primary level; 0 otherwise	13.61
Secondary	=1 if completed secondary level; 0 otherwise	58.06
Higher	=1 if graduation or higher; 0 otherwise	13.49
Social group	Social categories (Ref. Scheduled Castes or SC)	9.39a
ST	=1 if Scheduled Tribes (ST); 0 otherwise	53.18
OBC	=1 if Other Backward Classes (OBC); 0 otherwise	8.78
Others	=1 if none of the above groups; 0 otherwise	28.65
Religion	Religion (Ref. Hindu)	32.87a
Muslim	=1 if Muslim; 0 otherwise	16.62
Christian	=1 if Christian; 0 otherwise	39.67
Others	=1 if other religions such as Sikhism. Jainism. Buddhism etc.; 0 otherwise	10.84
Residence	Place of residence (Ref. Urban)	17.59a
	=1 if rural; 0 otherwise	82.41
Wealth	Household wealth quintile (Ref. Poorest)	23.78a
Poorer	=1 if 'poorer' quintile household; 0 otherwise	27.30
Medium	=1 if 'medium' quintile household; 0 otherwise	21.94
Richer	=1 if 'richer' quintile household; 0 otherwise	16.78
Richest	=1 if 'richest' quintile household; 0 otherwise	10.19
Distance	Difficulty in getting medical help (Ref. Not a problem)	32.82a
Big problem	=1 if big problem; 0 otherwise	34.41
Not a big problem	=1 if not a big problem; 0 otherwise	31.78
ANC visits	Number of antenatal care (ANC) visits(Ref. <4 visits)	43.82a
	=1 if completed at least 4 ANC visits; 0 otherwise	56.18
State dummies	Dummy variables for states/UTs in the IHR	-

Results

Utilisation of Maternal Healthcare Services

Utilisation of maternal healthcare services, in the region, remains far from being universal, and in several indicators, it fares poorly compared to the national level attainments (Table 2). For instance, for the most recent live births, about 42.2% women reported completing the recommended minimum 100 days of IFA intake, compared to the national average of 44.1%. Similar is the observation about IFA intake for 180 days or more, with only four states - Himachal Pradesh, Sikkim, Uttarakhand and Manipur - comparing with the national average of 26%. The estimate for the region remains at 22.3% - the lowest among various maternal healthcare indicators. Full ANC utilisation remains low as well, estimated at 26.4% against the national average of 35.4%. As for AQC, it is 31.9% compared to the national average of 46.1%. The region also lags behind in institutional delivery, estimated at 84.6%, compared to the national average of 90.1%. With regard to ANC visits, the region fares well, however. An estimated 65.4% women completed at least 4 ANC visits in the region; the national average being 58.5%. The region also performs well in terms of the first trimester antenatal check-up. Antenatal care components such as 'body weight measurement' and 'blood pressure measurement', 'blood sample test', 'urine test' and the 'abdomen test' are near universal, as is the situation for the country in general.

Intra-region disparities in maternal care indicators remain stark (Table 2). Nagaland remains at the bottom in most of these indicators. Moreover, compared to the national level attainments, three northeastern states- Arunachal Pradesh, Nagaland and Meghalaya - underperform in all the maternal care utilisation indicators considered in this study. Manipur stands out, on the other hand, lagging behind in only one parameter, followed by Himachal Pradesh and Sikkim staying behind in two parameters each. Himachal Pradesh tops the region in receipt of adequate quality care i.e. AQC (46.1%), followed by Manipur (44.7%), Mizoram (42.2) and Sikkim (41.6); the lowest being observed for Nagaland (7.1%) and Ladakh (10.8%).

Utilisation also varies across cross-sectional groups in the region (Table 3). Full ANC use and AQC in particular are lower, *inter alia*, for women with no formal schooling, in rural areas and for women with higher birth order. Maternal healthcare utilisation tends to improve with the household wealth and women's education. On the other hand, utilisation also remains lower for the Christian and the Muslim women, among others, for full ANC and AQC. Noticeably, among the social groups, Scheduled Tribes (ST) mothers perform poorly in several maternal care indicators in the region.

Table 2: Women's use of maternal healthcare services for the most recent live births (in %)

Indicator	ANC checkup in first trimester	At least 4 ANC visits	At least 2 doses of TT injection before birth	At least 100 days of IFA intake	At least 180 days of IFA intake	Institutional delivery	full ANC use	Receipt of AQC	No. of indicators with shortfall (out of 8)
	I	II	III	IV	V	VI	VII	VIII	
Nagaland	49.5	20.7	75.6	10.2	4.1	48.3	5.1	7.1	8
Meghalaya	53.9	52.2	63.9	43.1	20.6	63.2	20.1	25.5	8
Arunachal Pradesh	53.1	36.6	67.2	23.8	8.6	81.1	13.6	18.5	8
Tripura	63.2	55.2	92.8	26.7	8.9	90.4	15.0	20.3	6
Ladakh	85.8	78.9	87.8	14.3	7.3	95.5	9.5	10.8	4
Jammu & Kashmir	86.6	81.1	84.5	29.8	15.9	93.1	21.9	24.1	4
Mizoram	72.7	58.1	72.6	61.9	10.5	86.8	30.9	42.2	4
Uttarakhand	68.8	61.8	88.3	46.6	25.0	84.9	30.1	38.5	3
Himachal Pradesh	72.4	70.6	77.6	67.2	43.0	89.0	38.4	46.1	2
Sikkim	63.7	58.4	86.3	54.7	31.5	95.2	34.2	41.6	2
Manipur	79.9	79.4	84.7	52.3	30.3	82.6	43.1	44.7	1
IHR	71.4	65.4	82.2	42.2	22.3	84.6	26.4	31.9	6
India	70.0	58.5	83.1	44.1	26.0	90.1	28.5	35.4	NA

Source: Authors' estimation from NFHS-5 data (2019-21)

Table 3: Cross-sectional distribution of maternal healthcare use in the study area, for the most recent live births (in %)

	At least 4 ANC visits	At least 100 days of IFA intake	At least 2 doses of TT injections before birth	Institutional Delivery	Full ANC use	AQC
Birth order						
1	69.55	44.32	89.34	92.09	30.78	36.20
2-3	65.96	42.46	79.98	84.98	25.56	31.17
4 or more	49.97	34.22	68.57	59.41	16.45	21.42
Education						
No schooling	56.15	29.68	76.38	71.40	17.05	21.07
Primary	54.83	36.07	77.16	69.66	19.93	25.66
Secondary	65.60	42.05	82.75	86.94	25.41	31.35
Higher	77.85	55.20	87.54	96.22	40.17	45.08
Social group						
SC	62.82	44.63	81.69	86.20	26.67	32.15

ST	50.56	36.34	72.92	70.67	18.90	24.62
OBC	67.57	43.64	87.09	88.04	29.50	33.63
Others	74.46	44.26	86.00	91.12	29.74	35.55
Religion						
Hindu	66.49	48.94	85.24	89.22	30.66	37.65
Muslim	75.68	30.88	85.61	88.70	22.00	24.80
Christian	49.08	38.51	69.12	65.85	19.83	25.03
Others	62.60	39.41	79.83	83.63	27.61	30.87
Residence						
Urban	73.59	46.75	86.40	92.61	33.62	38.34
Rural	62.67	40.65	80.73	81.93	24.05	29.76
Wealth quintiles						
Poorest	46.48	28.61	72.23	62.60	13.60	18.32
Poorer	58.83	35.92	79.61	77.56	19.81	25.46
Medium	64.69	42.03	83.68	87.13	25.66	31.94
Richer	73.70	46.61	86.45	93.37	32.03	37.73
Richest	78.68	54.49	86.27	96.87	38.05	42.80
Distance						
Not a problem	71.62	49.27	83.83	90.61	32.51	37.48
Big problem	56.67	34.94	78.45	76.14	20.01	26.08
Not a big problem	64.56	38.69	83.15	83.82	23.69	29.29
ANC visits						
<4 visits	-	33.41	73.84	72.85	-	19.03
4 or more visits	-	46.81	86.54	90.81	-	38.71
IHR	65.40	42.17	82.15	84.60	26.44	31.90

Source: Authors' estimation from the NFHS-5 data (2019-21)

Determinants of Maternal Healthcare Use

The adjusted odds ratios (AOR) for the IHR vis-à-vis its counterpart rest of India, for utilisation of *specific* maternal care services, are presented in Table 4. It shows that, after controlling for other factors, women in the study area are *more likely* to complete at least 4 ANC visits (AOR: 1.14; CI: 1.08-1.21), but they are *less likely* to complete minimum 100 days of IFA intake (AOR: 0.69; CI: 0.65-0.73), receive 2 doses of TT injection (AOR: 0.86 CI: 0.80-0.92), or to have childbirths at health facilities (AOR: 0.50, CI: 0.46-0.55).

Table 5 presents the regression results for the *study area*, specifically. In the region, odds for completing at least 4 ANC visits are lower for birth order 4 or higher as compared to the first birth (AOR: 0.76, CI: 0.66-0.87). Odds are also lower for rural areas (AOR: 0.80, CI: 0.68-0.94), and for those reporting high degree of difficulty in health facility

access (AOR: 0.74, CI: 0.65-0.84), compared with their reference categories. The odds increase with women's formal education (AOR: 1.21 to 1.79) and household wealth (AOR: 1.37 to 2.24). Similarly, for *IFA intake for 100 days or more*, odds are lower for birth order 4 or higher (AOR: 0.83, CI: 0.71-0.96) but they increase with mother's education, and household wealth (AOR: 1.14 to 1.71). Compared with the Hindus, odds are lower for the Muslims (AOR: 0.78; 95%CI: 0.63-0.96) and the Christians (AOR: 0.72; 95%CI: 0.57-0.90). For *institutional delivery*, the odds are lower for higher birth order, but they increase with women's education (AOR: 1.07 to 2.53) and household wealth (AOR: 1.56 to 6.09). Odds are lower for women reporting high degree of difficulty in health facility access (AOR: 0.62, CI: 0.53-0.73). Odds are lower for the Muslims (AOR: 0.67; CI: 0.51-0.89) and the Christians (AOR: 0.68; CI: 0.53-0.87), as compared with the Hindus. Odds for institutional delivery are higher for those reporting at least 4 ANC visits (AOR: 2.18, CI: 1.93-2.46) compared with fewer antenatal visits. *TT injection* is near universal but tends to decrease with birth order.

Logistic regression results for *composite* indicators viz. *full ANC use* and *AQC* are presented in Table 6. It shows that, adjusting for other factors, women in the IHR are less likely to have full ANC use compared with their counterparts in the rest of India (AOR: 0.71; CI: 0.66-0.76), and so is the finding about AQC, with women in the region demonstrating lower odds of receiving AQC for the most recent live births (AOR: 0.63, CI: 0.59-0.67). *Within the region*, odds for *full ANC use* are higher for women with higher education (AOR: 1.52, CI: 1.20-1.92) and for those belonging to the wealthier households (AOR: 1.27-2.10). The odds are, on the other hand, significantly lower for rural areas (AOR: 0.82, CI: 0.70-0.96) and for birth order 4 or higher (AOR: 0.62, CI: 0.51-0.74). Similar are the findings about *AQC*. The odds are higher for women reporting at least 4 ANC visits (AOR: 2.43, CI: 2.17-2.71) and they increase with household wealth (AOR: 1.17-1.59). The odds of receiving AQC are lower for the Muslims (OR: 0.79, CI: 0.63-0.99) and the Christians (AOR: 0.71, CI: 0.57-0.89) compared with the Hindus. Education shows positive association. Compared with mothers with no formal schooling, in the region, odds for receiving AQC are higher for those who did higher education (AOR: 1.35; CI: 1.08-1.68).

Table 4: Logistic regression results for specific maternal healthcare services, with IHR dummy(N=176843)

	At least 4 ANC visits		At least 100 days of IFA intake		At least 2 doses of TT Injection before birth;		Institutional Delivery	
	AOR	95% CI	AOR	95% CI	AOR	95% CI	AOR	95% CI
IHR (Ref. Rest of India)	1.14***	1.08 1.21	0.69***	0.65 0.73	0.86***	0.80 0.92	0.50***	0.46 0.55
Birth Order (Ref. 1st birth)								
Birth order 2-3	0.84***	0.81 0.86	0.89***	0.86 0.92	0.61***	0.58 0.63	0.54***	0.51 0.57
4 or more	0.50***	0.56 0.62	0.66***	0.62 0.69	0.53***	0.50 0.57	0.34***	0.31 0.36
Education (Ref. No schooling)								
Primary	1.46***	1.39 1.53	1.32***	1.25 1.39	1.11***	1.04 1.18	1.36***	1.27 1.44
Secondary	1.68***	1.61 1.75	1.56***	1.49 1.63	1.08***	1.03 1.13	1.94***	1.84 2.06
Higher	1.85***	1.74 1.97	1.80***	1.70 1.92	1.13***	1.04 1.22	3.80***	3.35 4.32
Social Group(Ref. SC)								
ST	1.38***	1.30 1.47	1.36***	1.28 1.45	1.01	0.94 1.08	0.85***	0.79 0.92
OBC	0.93***	0.90 0.98	0.95**	0.91 1.00	0.95*	0.91 1.00	1.08**	1.01 1.15
Others	1.11***	1.06 1.17	1.08***	1.02 1.14	0.99	0.93 1.05	1.07	0.99 1.16
Religion (Ref. Hindu)								
Muslim	0.98	0.93 1.04	0.98	0.93 1.04	1.11***	1.05 1.19	0.67***	0.62 0.72
Christian	1.07	0.97 1.20	1.65***	1.49 1.83	0.97	0.85 1.10	0.69***	0.62 0.78
Others	0.85***	0.76 0.94	1.18***	1.07 1.30	0.91	0.80 1.02	0.99	0.85 1.16
Residence (Ref. Urban)								
Rural	0.83***	0.78 0.87	0.85***	0.81 0.89	1.01	0.95 1.07	1.04	0.95 1.15
Wealth (Ref. Poorest)								
Poorer	1.39***	1.33 1.45	1.12***	1.07 1.17	1.05**	1.00 1.11	1.64***	1.55 1.73

Middle	1.81***	1.73 1.90	1.30***	1.24 1.37	1.02	0.97 1.08	2.28***	2.12 2.46
Richer	2.02***	1.90 2.14	1.48***	1.40 1.56	1.08**	1.01 1.16	3.08***	2.79 3.40
Richest	2.13***	1.99 2.28	1.62***	1.52 1.72	1.19***	1.10 1.29	4.49***	3.90 5.18
Distance (Ref. Not a problem)								
Big problem	0.82***	0.78 0.86	0.90***	0.86 0.94	0.90***	0.86 0.95	0.79***	0.75 0.84
Not a big problem	0.88***	0.85 0.91	0.91***	0.87 0.94	0.95**	0.90 0.99	0.92***	0.87 0.98
ANC visits (Ref. <4 visits)								
4 or more ANC	-	-	2.56***	2.47 2.65	1.65***	1.59 1.72	2.15***	2.05 2.26
Constant	0.87***	0.80 0.94	0.31***	0.29 0.34	5.07***	4.58 5.60	4.55***	4.00 5.17

Source: Authors' estimation from NFHS-5 (2019-21); Notes: ***, **, * indicate statistical significance at 1%, 5% and 10% levels respectively

Table 5: Logistic regression results for specific maternal healthcare services, for the study area (IHR)(N=28691)

	At least 4 ANC visits		At least 100 days of IFA intake		At least 2 doses of TT injections before birth		Institutional Delivery	
		95% CI	AOR	95% CI	AOR	95% CI	AOR	95% CI
Birth order (Ref. 1st birth)								
2-3	0.94	0.86 1.03	1.00	0.91 1.09	0.51***	0.45 0.57	0.61***	0.53 0.70
4 or more	0.76***	0.66 0.87	0.83**	0.71 0.96	0.40***	0.34 0.46	0.35***	0.29 0.41
Education(Ref. No schooling)								
Primary	1.21**	1.02 1.43	1.05	0.87 1.26	1.12	0.94 1.34	1.07	0.90 1.27
Secondary	1.30***	1.14 1.49	1.14	0.97 1.35	1.08	0.92 1.26	1.55***	1.34 1.79
Higher	1.79***	1.47 2.18	1.37***	1.11 1.68	1.15	0.92 1.44	2.53***	1.90 3.37
Social group(Ref. SC)								
ST	0.88	0.72 1.08	0.94	0.76 1.15	1.20	0.95 1.51	0.81	0.63 1.04

OBC	1.23**	1.01	1.50	1.00	0.83	1.21	1.29**	1.01	1.66	1.28*	0.97	1.71
Others	1.18**	1.01	1.37	1.05	0.89	1.24	1.25**	1.03	1.52	1.05	0.84	1.31
Religion (Ref. Hindu)												
Muslim	1.10	0.92	1.32	0.78**	0.63	0.96	1.05	0.83	1.34	0.67***	0.51	0.89
Christian	0.95	0.76	1.18	0.72***	0.57	0.90	0.88	0.70	1.11	0.68***	0.53	0.87
Others	1.00	0.80	1.24	0.74**	0.58	0.94	1.03	0.83	1.29	0.81	0.63	1.05
Residence (Ref. Urban)												
Rural	0.80***	0.68	0.94	0.95	0.81	1.11	0.93	0.76	1.13	0.71***	0.57	0.89
Wealth (Ref. Poorest)												
Poorer	1.37***	1.21	1.55	1.14**	1.01	1.29	1.22***	1.08	1.38	1.56***	1.36	1.78
Middle	1.54***	1.34	1.78	1.31***	1.14	1.51	1.44***	1.24	1.67	2.51***	2.10	3.00
Richer	2.02***	1.69	2.41	1.42***	1.19	1.69	1.58***	1.31	1.91	3.92***	3.07	5.01
Richest	2.24***	1.82	2.75	1.71***	1.39	2.11	1.27**	1.01	1.60	6.09***	4.24	8.75
Distance (Ref. Not a problem)												
Big problem	0.74***	0.65	0.84	0.90	0.79	1.03	0.97	0.84	1.12	0.62***	0.53	0.73
Not a big problem	0.97	0.86	1.09	0.96	0.85	1.08	1.09	0.95	1.25	0.84**	0.71	0.99
ANC visits (Ref. <4 visits)												
4 or more visits	-	-	-	1.59***	1.43	1.76	2.04***	1.84	2.27	2.18***	1.93	2.46
Constant	2.46***	1.82	3.31	0.24***	0.16	0.34	2.97***	2.05	4.31	8.44***	5.44	13.12

Source: Authors' estimation based on NFHS-5 data (2019-21). Notes: state dummies included in regressions for the study area i.e. IHR; ***, **, * indicate statistical significance at 1%, 5% and 10% levels respectively

Table 6: Logistic regression results for composite maternal healthcare services –full antenatal care (full ANC) and adequate quality care (AQC)

	Regression with IHR dummy (N=176843)				Regression for the IHR (N=28691)			
	full ANC		AQC		full ANC		AQC	
	AOR	95% CI	AOR	95% CI	AOR	95% CI	AOR	95% CI
IHR(Ref. Rest of India)	0.71***	0.66	0.76	0.63***	0.59	0.67	NA	NA
Birth Order (Ref. 1st birth)								
Birth order 2-3	0.77***	0.75	0.80	0.81***	0.78	0.84	0.84***	0.76
4 or more	0.49***	0.46	0.53	0.57***	0.54	0.61	0.62***	0.51
Education (Ref. No schooling)								
Primary	1.54***	1.44	1.64	1.28***	1.21	1.36	1.09	0.88
Secondary	1.82***	1.73	1.92	1.51***	1.44	1.58	1.11	0.91
Higher	2.16***	2.02	2.31	1.72***	1.61	1.83	1.52***	1.20
Social Group (Ref. SC)								
ST	1.36***	1.27	1.45	1.36***	1.27	1.44	0.88	0.69
OBC	0.92***	0.88	0.97	0.95**	0.90	0.99	1.11	0.92
Others	1.05	0.99	1.11	1.04	0.99	1.10	1.04	0.88
Religion (Ref. Hindu)								
Muslim	1.04	0.98	1.11	1.04	0.99	1.11	0.86	0.68
Christian	1.57***	1.41	1.75	1.58***	1.42	1.77	0.81	0.63
Others	0.94	0.85	1.04	1.11**	1.00	1.22	0.92	0.72
Residence (Ref. Urban)								
Rural	0.81***	0.77	0.85	0.86***	0.82	0.91	0.82**	0.70

potential barriers in Nagaland, as was observed by Cáceres et al. (2023). Furthermore, women's tendency to depend on men and the importance of the latter's permission, albeit not by customs or rules, are feared to adversely affect maternal healthcare utilisation (Cáceres et al., 2023). Lack of awareness constitutes yet another major deterrent. The survey data provides some evidence thereof, particularly with regard to non-institutional childbirths. In the region, a major proportion of non-institutional deliveries were due to *perceived lack of necessity* (41.9%), *being not allowed by husband/family* (5.33%), or feeling of institutional births *not customary* (2.1%). Thus, the survey findings and previous studies offer some explanations for the current state of maternal healthcare use in the region. Nevertheless, it is not to argue that these deterrents are exclusive to the region; rather, they may be more general in their prevalence, albeit in varying degrees. Hence, these evidence may be insufficient to explain the *relatively* poor performance in the region, but they do explain, to some extent, why it remains poor.

Multivariate procedures have also been employed to identify the determinants of maternal healthcare use in the region. Birth order is found to negatively affect utilisation of several maternal care services. This finding is worrying, and while it remains largely unexplained, absence of complications in previous pregnancies may be a leading factor. Utilisation increases with household wealth. On the other hand, wealthier women are observed more likely to utilise various maternal care services, aligning with many previous studies in India in general (Ghosh & Ghosh, 2020; Hamal et al., 2020; Kumar et al., 2019). There is no doubt that household wealth is one of the *enabling* factors, as conceptualised in Andersen's behavioral model (Andersen 1968), that enhance financial accessibility to healthcare services (Levesque et al., 2013). Utilisation is also seen to differ with women's religion. In particular, in the region, Muslim mothers are observed less likely to complete recommended 100 days of IFA intake or to do institutional childbirths, as are the findings in other studies in India in general (Yadav et al., 2021; Paul & Chauhan, 2020; Mondal et al., 2020; Hamal et al., 2020). Similar is the finding about receiving adequate quality of care, with the odds being statistically significantly lower for Muslims as compared with the Hindus. Cultural factors constitute crucial *predisposing* factors in healthcare access. Specific reasons for Muslim mothers' poor utilisation of maternal care services are not well documented in India's contexts, but studies in other parts of the world, for example in Northern Ghana, point to religious obligations and insensitivity of the healthcare providers to their cultural and religious practices as one of the barriers (Ganle, 2015). In the United Kingdom (UK), Hassan (2022) similarly observes that Muslim mothers preferred not to be seen by male health professionals, especially during clinical examinations or labour. Health professionals, on the other hand, may not be trained enough to address these specific cultural and religious aspects of maternity care (Hassan et al., 2020). In the region, based on findings in Nagaland, integration of cultural sensitivity to contemporary maternal care was suggested by Shohe (2024). Rural-urban disparities in maternal healthcare use are similarly reported in numerous studies in India (Mondal et al., 2020; Paul & Chouhan, 2020), and so are the observation for the study area. The rural-urban disparity may be attributable, among others, to the distance or the difficulty rural households encounter in access to health facilities, especially in contexts of hilly terrains and poor transport

services. Estimate from the survey data shows close to 64% of the women in *rural* areas pronouncing some degree of difficulty in health facility access in the region. Controlling for other factors, results also show that antenatal visits positively impact utilisation of many other maternal care services including IFA intake, institutional delivery and receipt of AQC, showcasing their importance in improved maternal healthcare in the region. Similar findings can be found in Billah et al. (2022). This finding may be attributable to the awareness created through mother-healthcare provider interactions during antenatal visits. Cautiously, while the region performs *relatively* better in antenatal visits, in *absolute* term, however, the attainment remains far from being universal. Last but not the least, formal education appears as a significant contributor to maternal healthcare use in the region, and is supported by several other studies on the subject.

The findings and their discussion reveal useful insights for maternal healthcare policies in the region. More specifically, they suggest measures to address both demand and supply side concerns in maternal care in the region. *First*, the hilly terrains, without a doubt, produce difficulties in healthcare access, but, as an alternative, expansive use of mobile health camps, Mobile Medical Units (MMUs), mobile distribution posts and depots for IFA and other supplements, especially in remote and interior locations, may be emphasised in the region (also see Nongdhar et al., 2018; Bora et al., 2022). *Second*, crucial supply side measures such as improved health facility infrastructure, suitable opening hours and availability of health workers and emergency care services are needed. *Third*, socio-cultural and demographic diversity in the region also requires training of healthcare staff to handle area-specific religious, cultural and traditions related concerns in maternity care. Widespread availability of female healthcare providers can be similarly useful in this regard. These will enhance service acceptability and psychosocial accessibility to maternal healthcare. *Fourth*, efforts are needed to create awareness and to educate mothers as well as their partners. Lack of awareness was identified as a major reason for poor antenatal visits in the region, for instance, by Limbu, Kamei and Haloí (2022). Similarly, as already stated elsewhere in the study, *perceived lack of necessity*, suggesting lack of awareness, appears as a major deterrent to institutional childbirths in the region, as revealed by NFHS-5 survey. ASHAs (Accredited Social Health Activists) can play a pivotal role in this regard, through sensitizing the couples, and making arrangements for healthcare visits and institutional deliveries (Gebremedhin et al., 2022). Notably, some studies in the region observe ASHAs being held at high esteem and considered the most influential by the mothers (Cáceres et al., 2023). *Fifth*, incentive-based schemes such as *Janani Suraksha Yojana* (JSY) and provision of affordable medical transports can incentivise and enable healthcare use, especially among the poorer sections, who are observed less likely to utilise many maternal care services. Similarly, an effective implementation of other schemes such as *Pradhan Mantri Surakshit Matritva Abhiyan* (PMSMA) – that seeks to provide assured, comprehensive, quality and free-of-cost antenatal care to all pregnant women – will be useful in this regard (Mustafa & Shekhar, 2021). Though not strictly comparable, Mustafa and Shekhar (2021) show lower probability of receiving financial assistance such as under JSY by women in the region. *Finally*, besides the long term solutions, as short term measures, priority may be given to certain cross-sectional groups with poorer utilisation of maternal care services in the

region. To sum up, our findings and insights from existing literature allow us to conclude that while frequently prioritised measures such as betterment of health infrastructures are necessary, equally important are the measures to educate and create awareness, to ensure affordability and financial accessibility, and to increase acceptability of maternal care services in the region.

This study is subject to certain limitations. *First*, by utilising only the NFHS-5 data, it fails to identify the underlying reasons for non-use of *specific* maternal care services in the region. An effort was made, however, to provide an overview of the plausible barriers, by drawing insights from the literature. *Second*, it offered a discussion on utilisation or receipt of various maternal care services/components, but medico-clinical quality of care remains outside the scope. *Third*, the data is largely based on respondents' recollection, and, hence, response biases cannot be ruled out entirely. *Finally*, the study, relying on the eventual *use or non-use* of maternal healthcare services, leaves a major gap with regard to the lived experiences of the mothers. To sum up, however, despite these limitations, the present study contributes to the scant literature on maternal healthcare in the mountainous Himalayan region of India.

Conclusion

Risks of maternal deaths can be reduced through quality and adequate maternal care services. Using large scale survey data, in this study, analysis on utilisation of maternal healthcare services in a geographically challenged and geopolitically strategic Himalayan region of India has been taken up. The analysis presented a comparison of the attainments in crucial maternal care indicators in the region vis-à-vis the rest of India. Three observations emerge from the study: First, maternal healthcare use and its adequacy remain far below the desired goals of universal and adequate maternal care utilisation in the region. Second, relative to the national level attainments and compared with its counterpart rest of India, the region performs poorly in several indicators, including full antenatal care use and receipt of adequate quality care. Third, there remain stark intra-region disparities among the states/UTs and significant variations across cross-sectional groups. The study carries certain limitations, but, the findings, largely supported by previous studies, reveal useful insights for policies to address the various concerns in maternal healthcare in the region. Besides long term measures, as short term approach, priority may be given to more vulnerable groups such as the poor, Muslims and the Christian mothers, higher birth order cases, and those with less formal education in the region. Crucial literature gaps remain, however. In particular, in view of high maternal mortality ratio in the region, studies on medico-clinical quality of care hold paramount importance. Studies are also needed to comprehend the lived maternity experiences of the mothers. Furthermore, future large scale surveys should collect information on key barriers to maternal healthcare access, at least at the narrower geographical levels such as village, and elicit the reasons for non-use of critical care components. Such information will facilitate context and region-specific understanding of the subject and help design sub-national policies for improved maternal healthcare not only in the present study area but in the country in general.

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Gendered Labour Governance and Unequal Rights in Tea Plantations: Evidence from Golaghat, Assam

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Abstract

Women's labour in Assam's tea plantations is embedded within a system where statutory rights exist formally but are selectively realised through conditional, segmented, and discretionary labour governance. Drawing on qualitative research in Golaghat district, this paper examines how gendered inequalities are produced and sustained through everyday plantation work regimes rather than through absence of legislation alone. Based on in-depth interviews with sixteen women workers, participant observation, and discussions with estate authorities, the study analyses the gap between the Plantations Labour Act, 1951 and workers' lived realities. Findings show that entitlements related to wages, maternity benefits, sickness leave, sanitation, and work-related essentials are not uniformly accessible but mediated by employment status (permanent/temporary), managerial discretion, and weak enforcement structures.

The paper reconceptualises feminisation of labour as an ongoing process of labour governance characterised by normalised precarity, conditional access to welfare, and everyday disciplinary practices within plantation hierarchies. It demonstrates that women workers' marginalisation is reproduced not only through economic exploitation but also through systematic regulation of access to rights, bodily needs, and collective representation.

By foregrounding how inequality is actively produced rather than merely experienced, the study contributes to feminist labour scholarship by revealing contemporary mechanisms through which plantation economies sustain gendered subordination despite formal legal protections.

Introduction

Assam is a key contributor to India's tea industry, producing over half of the country's total tea and supporting a large plantation workforce. The state's tea gardens are internationally recognised for their economic importance, playing a significant role in national exports and sustaining regional livelihoods.

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Within this plantation economy, women form the core of the labour force and are indispensable to the production process (Khatoniar & Das, 2025). Plantation commodities such as tea rely heavily on women's labour, particularly in labour-intensive tasks, making women central to sustaining productivity (Rasaily, 2014). In Assam, approximately one million women are employed in tea gardens, constituting nearly half of the plantation workforce (Borthakur, 2023; IDH, 2020). Their concentration in activities such as tea plucking is shaped by gendered assumptions that associate women with dexterity, patience, and precision. This gendered organisation of work serves both production efficiency and the reproduction of a stable labour force. At the same time, women tea plantation workers are frequently showcased in visual representations and state narratives as emblematic figures of the industry. However, this symbolic visibility contrasts sharply with the structural conditions governing their labour, highlighting the need for a sustained gendered and political-economic analysis of women's work in Assam's tea plantations.

From a feminist perspective, the discourse on gender and labour in tea plantations raises critical questions about the intersections of public and private spheres, production and reproduction, and the so-called "triple burden" carried by women. Scholars emphasise that plantation ideology continues to systematically oppress workers, with women disproportionately bearing the brunt of hierarchical and exploitative labour practices (Baruah, 2018; Patel, 2020). Besky (2014) critiques the plantation economy by interrogating "three parallel visions of justice"—justice as property, justice as fairness, and justice as sovereignty—highlighting the alienation of female workers and the persistent injustices they face. The gendered division of labour reinforces a social hierarchy in which women are confined to the lowest and most expendable positions, often treated as a cheap and abundant labour force rather than recognised as skilled or specialised contributors (Gurung & Mukherjee, 2018). This theoretical and empirical framing underscores the structural marginalisation and feminisation of labour that define the Assam tea plantation industry, providing a critical foundation for analysing not only continuity but also the evolving forms through which women workers' subordination is reproduced.

Global scholarship on women and labour highlights that women's work is often excluded from national income statistics, implying that a substantial portion of their labour remains unremunerated and unaccounted for in GDP calculations (Chakraborty, 2022). Women's contributions are particularly undervalued economically due to narrow definitions of what constitutes "productive" or "market-oriented" activities. According to the Census of India (2011), 'work' is defined as any activity that is productive and compensated, and a 'worker' is a person primarily engaged in such work. Individuals who work for the majority of the reference year are categorised as 'main workers,' while those engaged for only a limited portion of the year are considered 'marginal workers.' Similarly, the NSSO classifies a person as a worker if she or he is involved in any economically gainful activity, including tasks such as animal care, fodder collection, and food preparation—activities predominantly undertaken by women (Mondal, 2022). Consequently, in discussions on women and labour, a critical question arises: what is

recognised as work, and whose labour is counted as economically productive (Ekka, 2022). This issue underscores the structural invisibility of women's labour, a key dimension of feminisation theory, and is directly relevant to understanding both the persistence and institutional normalisation of women's marginalisation in Assam's tea plantations.

Based on the aforesaid, the present study was designed to examine the challenges faced by women workers in the tea plantations of Golaghat, with a focus on understanding their working conditions and experiences of gender-based discrimination. The study aims to provide a critical insight into the lived realities of women tea plantation workers in Assam through a feminist lens. The central argument of this paper is that, although women constitute a substantial proportion of the plantation labour force, their work remains undervalued, gendered, and structurally exploited, encompassing both paid plantation labour and unpaid reproductive responsibilities. Drawing on feminist perspectives on labour and social reproduction, the study highlights the gendered division of work, the adverse conditions under which women labour, and the socio-economic constraints that shape their marginalisation within the plantation system.

The current paper addresses pertinent research questions including an exploration of the working conditions of women working in tea plantations, the influence of gendered power relations on their work conditions, their day-to-day psychological, social and financial impediments, and how context-specific and feminist-focused policies can contribute to empowerment. In pursuit of these questions, the paper places special emphasis on the voices and lived experiences of women workers, while also contributing to broader debates on gender, labour, and justice within the plantation sector in India.

Mapping the Theoretical Context

The paper theorises and foregrounds the feminisation of labour as its central analytical framework. Feminisation of labour provides a critical lens for examining the gendered organisation of work beyond women's numerical participation in paid employment. It refers to the qualitative transformation of labour characterised by low wages, employment insecurity, limited social protection, and the systematic devaluation of work predominantly performed by women. Feminist political economy scholars argue that women's labour is constructed as flexible and supplementary, thereby reinforcing gendered hierarchies within labour markets. This transformation also reflects a broader shift in employment relations, where irregular and precarious conditions—once associated with women's 'secondary' work—have become widespread across sectors (Kanjilal and Menon-Sen, 2001). Azis (2020) describes feminisation as an *"increase in women employment, particularly in the labour sector"* and emphasises *"its focus on the changing nature of women's work, from domestic and care-based labour to subcontracted and informal employment"* (p.3).

Within this conceptual framing, plantation economies such as the tea industry represent a distinctive and historically entrenched site of feminised labour. Tea plantation work

relies heavily on women for labour-intensive tasks, while authority, ownership, and decision-making remain largely male-dominated. Feminisation theory therefore enables an analysis of how occupational segregation, paternalistic management practices, and uneven enforcement of labour regulations collectively sustain women's subordinate positions, even within formally regulated labour regimes (Khatoniar & Das, 2025). It also highlights the structural interdependence between paid plantation labour and unpaid reproductive labour, where women are expected to simultaneously manage wage work and domestic caregiving responsibilities, effectively subsidising the plantation economy.

In the context of Assam's tea plantations, feminisation of labour is further reinforced through the intersection of global capitalist processes and local socio-economic inequalities. Globalisation and expanding capitalist production have intensified structural vulnerabilities, disproportionately affecting women across rural, Dalit, and tribal communities in conditions of paid, underpaid, and unpaid labour (Patel, 2009, 2020). Within plantation labour systems, women's work is systematically devalued not only through wage structures but also through deeply embedded socio-cultural norms that normalise their dual burden of productive and reproductive work. These norms shape labour participation in ways that reproduce the perception of women's work as secondary, thereby sustaining its invisibility and economic undervaluation.

To further situate feminised labour within the plantation context, it is necessary to engage with the socio-cultural construction of gender. Gender, as a socially produced division of roles and expectations, operates as a foundational axis of hierarchy across households, workplaces, and institutions. It produces enduring inequalities in access to resources, opportunities, and decision-making power (Kabeer, 2000), thereby constraining women's agency—the capacity to define and pursue one's own life choices (Chakraborty, 2020). Sen (1988) further argues that persistent inequality may lead marginalised groups to internalise subordinate positions, thereby normalising compliance within unequal structures.

The tea plantation system exemplifies these intersecting gendered labour hierarchies. As Baruah (2018) explicates, plantations represent a transition from feudal to capitalist relations in which women's labour is instrumentalised as an input to production rather than recognised as skilled work. Women's work is routinely classified as unskilled and assigned lower status, confining them to the least valued segments of the labour hierarchy. Even where formal wage parity may exist, occupational segregation ensures that women remain concentrated in lower-valued tasks, demonstrating how gender continues to mediate labour valuation. Similarly, Neetha (2021) highlights that women's concentration in the lower segments of the informal economy and their persistent marginal status are reinforced by policy frameworks shaped by patriarchal assumptions that position women as dependents rather than workers in their own right. These structural conditions collectively sustain the long-term reproduction of feminised labour regimes.

Importantly, this theoretical framework also provides the basis for examining not only the continuity of feminisation in plantation labour, but also its evolving and increasingly institutionalised forms. The empirical findings of this study illustrate how feminisation is reproduced through contemporary mechanisms such as differential access to statutory entitlements, conditional welfare provisions, and managerial control over mobility, dignity, and bodily autonomy, thereby extending rather than merely replicating earlier forms of labour subordination.

Review of Literature

The existing literature on women workers in the unorganised sector collectively demonstrates that women labourers are systematically undervalued, economically insecure, and embedded within broader structures of patriarchy and economic exploitation. Scholars widely agree that the distinction between organised and unorganised labour is not merely administrative but deeply political, as it determines access to rights, protection, and dignity at the workplace. Divyakamakshi and Kalavathi (2014) highlight that while the organised sector is characterised by regular employment, unionisation, and state oversight, the unorganised sector—where a large proportion of women workers are concentrated—remains largely unprotected and precarious, thereby perpetuating structural inequality.

Empirical studies further reveal that women in the unorganised sector experience multiple and intersecting vulnerabilities, including job insecurity, long working hours, wage discrimination, limited legal protection, poor working conditions, and instances of exploitation (Gaur and Rana, 2002). These conditions are not incidental but structurally produced, reflecting the systemic positioning of women's work as secondary and undervalued. Such vulnerabilities directly constrain women's productivity, well-being, and upward mobility, reinforcing cycles of poverty and marginalisation (Buragohain and Anand, 2024).

Focusing specifically on plantation labour, scholars highlight the intersection of gender, class, and capitalist relations in shaping women's lived realities. Baruah (2022) underscores the reliance of the tea plantation industry on cheap and temporary female labour, arguing that this reflects both capitalist extraction and patriarchal control. Women are required to perform dual roles—as wage workers in plantations and as unpaid caregivers within households—thereby intensifying their labour burden. Marx's *Economic and Philosophical Manuscripts* (1844) further situates women's status as an indicator of broader societal development, pointing to the continued exploitation of women workers as evidence of deeper structural inequalities within capitalist systems.

The literature also documents the wide-ranging and persistent deprivations experienced by women tea plantation workers in their everyday lives. Sarkar, Chowdhury, Roy and Chowdhury (2016) identify challenges such as inadequate healthcare services, alcoholism, maternal mortality, denial of basic rights, child labour, lack of access to clean drinking water, early marriage, disease outbreaks, illiteracy, and entrenched

superstitions. These findings suggest that exploitation extends beyond the workplace into broader social and community spheres, significantly affecting women's health, education, and overall quality of life. Agarwalla (2021) further reinforces this argument by highlighting the paradox wherein women, despite being the backbone of the tea plantation economy, are relegated to the lowest occupational and social positions and continue to be perceived as unskilled and cheap labour.

While much of the literature emphasises structural oppression and victimhood, Borthakur (2023) provides an important corrective by foregrounding women's agency and everyday forms of resistance. Her study shows that women tea plantation workers in Assam negotiate workplace and household discrimination through subtle strategies such as deception, gossiping, slacking, rumour-spreading, and informal resistance. These practices, though often overlooked, demonstrate that women are not passive victims but active agents navigating constrained structural conditions.

Overall, the literature provides a comprehensive understanding of structural vulnerabilities such as wage discrimination, job insecurity, and poor working conditions. However, it remains limited in several important ways. First, much of the scholarship treats women workers as a homogeneous category, thereby obscuring sector-specific and context-specific realities, particularly within historically regulated plantation economies. Second, studies focusing on tea plantations have largely emphasised production relations and economic exploitation, with comparatively less attention to women's lived experiences, bodily vulnerabilities, and everyday negotiations of survival. Third, while agency is acknowledged, it is not sufficiently integrated with structural analysis, leading to a fragmented understanding of women's lived realities.

Despite Assam's centrality to India's tea economy, there remains a limited body of empirically grounded, gender-sensitive research that systematically engages with women tea plantation workers through sustained field-based inquiry. Existing studies do not adequately capture how gendered labour hierarchies are reproduced through everyday institutional practices, welfare exclusions, and differentiated access to rights within plantation systems. This creates a clear research gap in understanding the lived, embodied, and structural dimensions of women's labour in tea plantations.

Against this backdrop, the present study is conceptualised to develop a context-specific, gender-responsive, and empirically grounded understanding of the challenges faced by women workers in the tea plantation industry of Golaghat, Assam.

Research Objectives

The objectives of the study are as follows:

- To examine the working conditions of women workers in tea estates through a feminist analytical perspective.
- To explore the everyday lived experiences and challenges faced by women working in the tea plantation sector.

- To propose context-specific and gender-responsive strategies for the empowerment of women tea plantation workers.

Research Methodology

The study was conducted in the Golaghat district of Assam and adopted a qualitative approach with a descriptive research design. Golaghat district is a significant centre of tea plantation activity in Assam and forms an important part of the state's tea economy. The district comprises numerous tea estates engaged in the cultivation and processing of tea leaves. At present, there are seventy-four tea estates in Golaghat district, distributed across Golaghat, Bokakhat, and Dhansiri regions (Directorate of Tea Tribes and Adivasi Welfare, Government of Assam, 2023).

For the present study, two tea estates (referred to as TE1 and TE2) were selected due to their large workforce. TE1 comprised 3,214 tea plantation workers, of whom 1,994 (62%) were women, including 821 permanent and 1,173 temporary workers. TE2 comprised 2,371 workers, of whom 1,430 (60%) were women, including 428 permanent and 1,002 temporary workers.

Purposive sampling was used to select participants. The inclusion criteria focused on married women tea plantation workers aged 25–40 years with at least one child. Both permanent and temporary women workers were included, while those not meeting these criteria were excluded. A total of sixteen women tea plantation workers (eight from each tea estate) were interviewed in-depth after obtaining formal permission from the respective tea garden authorities.

Primary data were collected using semi-structured interviews. The first author conducted interviews with participants within the tea gardens and during home visits, enabling in-depth engagement with their lived experiences. In addition, interviews were conducted with tea garden managers of TE1 and TE2 to obtain contextual information on the organisational structure and functioning of the estates. Permission was also obtained to access official records, which facilitated the development of detailed profiles of the selected tea estates. Secondary data included estate records and reports, which were used to analyse workforce composition and demographic characteristics.

The study further employed participant observation during field visits. Detailed field notes were maintained to capture contextual and non-verbal dimensions of everyday work practices and social interactions.

Data were analysed using thematic analysis. Interviews were transcribed verbatim in Assamese and subsequently translated into English. The data were then systematically coded, and themes and subthemes were developed inductively. These themes were organised to ensure conceptual coherence and analytical depth, integrating diverse empirical insights related to the research focus. Field notes from observations were also incorporated to triangulate findings and strengthen interpretation.

Each of the sixteen women tea plantation workers who participated in the study was assigned a pseudonym (P1–P16), where “P” denotes participant, following informed consent. This coding system was adopted to ensure confidentiality and anonymity of respondents in accordance with ethical research considerations.

Ethical considerations, including informed consent, confidentiality, and voluntary participation, were strictly adhered to throughout the study.

Key Research Findings

The study reveals how gendered labour inequalities in tea plantations are systematically produced through conditional access to statutory rights and differentiated labour governance practices.

1. Meagre Wages

The women tea plantation workers received weekly wages of Rs. 232 per day on every Friday. It was disbursed in cash after a deduction of 12% as Provident Fund, resulting in a net amount of approximately Rs. 1200 to Rs. 1250 per week. While this wage structure appears uniform across workers, both male and female, the study reveals that the adequacy of wages must be understood within the broader structural context of plantation labour rather than as an isolated figure. Around 68% of the women tea plantation workers reported that their savings were insufficient to meet basic household needs, particularly in the context of rising prices and large family sizes.

P3: “The available savings are not enough to meet the basic requirements, as the prices of goods are also increasing. However, we try to manage with whatever we have.”

P10: “The available savings are too less. But, we have learned by now how to manage with fewer saving.”

The responses indicate that the issue is not merely the “low wage” in absolute terms, but the structural conditions that define how wages are fixed, perceived, and lived. The plantation wage system operates within a historically stabilised framework where wages are standardised across categories of workers, thereby limiting scope for negotiation. This standardisation often masks the inadequacy of wages in relation to contemporary cost of living and household survival needs.

The persistence of Rs. 1200–1250 per week as a wage level reflects the long-term institutionalisation of plantation labour as “low-cost labour”, which is maintained through a combination of economic dependency, restricted labour mobility, and limited alternative livelihood options. Workers’ dependence on plantation employment for housing and basic services further weakens their bargaining position, making wage negotiation structurally difficult.

Historically, plantation labour in Assam has evolved through systems of controlled settlement and dependency, where workers' mobility and economic choices remain constrained within estate boundaries (Duara & Mallick, 2012). This embedded dependence reduces the possibility of exit from the system, thereby reinforcing acceptance of prevailing wage structures. In addition, patterns of migration and historical marginalisation of labouring communities (Baruah, 2008) contribute to limited access to education and alternative employment pathways, further sustaining wage stagnation.

From a gendered perspective, women's wages are additionally shaped by the undervaluation of their labour within the broader plantation economy. Although wage parity may exist formally, women's work is often concentrated in labour-intensive yet low-status tasks such as tea plucking, which are socially constructed as "unskilled". This reinforces the perception of women's labour as supplementary, thereby legitimising low wage thresholds within the system.

Over time, such wage structures become normalised both institutionally and socially, reducing the perceived legitimacy of demands for wage enhancement. Women workers, embedded within these conditions of economic constraint and social acceptance, often develop coping strategies centred on subsistence management rather than wage resistance.

2. Unsanitary Workplace Environment

Chapter III of the Plantations Labour Act, 1951 mandates the provision of separate and adequately maintained latrines and urinals for male and female workers, to be located in accessible areas and maintained under hygienic conditions (Plantations Labour Act, 1951).

Interviews were conducted with women tea plantation workers and tea garden authorities from both estates to assess the availability of sanitation facilities at the workplace. According to the management of Tea Estate 1 (T1), a total of 994 latrines and urinals were provided, of which 546 were designated for female workers and 448 for male workers. In contrast, the authorities of Tea Estate 2 (T2) reported the availability of 16 sanitation units, evenly distributed between male and female workers. However, all sixteen women workers interviewed stated that no latrines or urinals were accessible within or in close proximity to the tea garden areas, indicating a clear discrepancy between official claims and workers' lived experiences.

P1: "There are no latrines near the tea garden. So, we do it outside."

P4: "Not a single latrine or urinal is available in the tea garden area. We don't have any other way apart from doing it outside."

The responses highlight not only a gap between official reporting and lived reality, but also the institutional conditions through which such gaps are produced and sustained. The existence of reported infrastructure alongside its non-accessibility to workers

indicates weak accountability mechanisms and limited independent monitoring within the plantation governance system. In practice, compliance with statutory provisions appears to operate more as a formal administrative requirement rather than an enforceable obligation shaped by workers' everyday experiences.

This gap is enabled by the structural positioning of women tea plantation workers within a highly dependent labour regime. Their access to livelihood, housing, and basic amenities is largely mediated through the plantation management, which significantly constrains their ability to question, report, or challenge inadequate facilities. Such dependency creates a condition where statutory rights exist on paper, but their realisation is contingent upon managerial discretion and local power hierarchies.

From a gendered and feminist perspective, the absence of sanitation facilities reflects the systemic invisibilisation of women's bodily and reproductive needs within plantation labour structures. The organisation of work assumes uninterrupted labour participation, without adequate consideration of gendered requirements such as privacy, sanitation, and menstrual hygiene. The discomfort associated with discussing bodily needs in male-dominated administrative spaces further contributes to institutional silence, where non-provision is normalised rather than contested.

Field observations corroborated that in the absence of accessible sanitation facilities, women workers were compelled to resort to open defecation, thereby compromising their dignity, safety, and health. Such conditions also severely undermine menstrual hygiene management, increasing vulnerability to infections and long-term health risks. The disparity between official records and ground realities suggests gaps not only in implementation but also in auditing and enforcement of labour welfare provisions under existing legal frameworks.

Thus, the issue extends beyond infrastructural inadequacy and reflects a deeper structural marginalisation of women within the plantation system, where gendered needs are systematically deprioritised despite formal legal safeguards.

3. Non-Compliance with Provision of Leaves with Wages

Chapter VI of the Plantations Labour Act, 1951 mandates that workers are entitled to paid leave at the rate of one day for every twenty days of work for adults, and one day for every fifteen days in the case of young workers. Data regarding the provision of annual leave with wages was collected through interviews with women tea plantation workers and tea garden authorities across both tea estates. The management of Tea Estate 1 (T1) reported granting fourteen days of paid annual leave to both permanent and temporary workers, while the authorities of Tea Estate 2 (T2) stated that workers received one day of paid leave for every twenty days worked in accordance with the provisions of the Act.

Contrary to these claims, four temporary women workers from T1 reported being denied annual leave on the grounds that their employment was limited to a six-month

period. As a consequence, the benefits relating to paid leave were effectively restricted to permanent workers. The findings therefore indicate partial compliance with the provisions of the Plantations Labour Act, 1951 and reveal greater vulnerability among temporary women workers in comparison to permanent workers.

The findings indicate that the gap between statutory entitlement and actual access is produced through the institutional organisation of labour within the plantation system. Although the law provides for paid leave, its implementation is filtered through employment categories that differentiate between “permanent” and “temporary” workers. This classification functions as an administrative mechanism through which rights are selectively extended, thereby transforming a universal entitlement into a conditional benefit.

This structural differentiation is further reinforced by the precarious position of temporary women tea plantation workers within the labour hierarchy. Their dependence on short-term or seasonal employment significantly limits their bargaining power and reduces the likelihood of raising grievances. In such a context, the fear of job loss and lack of alternative livelihood options contribute to passive acceptance of unequal treatment, thereby sustaining the existing system of exclusion.

From a feminist labour perspective, this reflects the broader process of casualisation of women’s work within plantation economies, where labour flexibility is achieved through insecurity and restricted social protection. Paid leave, instead of functioning as a statutory right, becomes a benefit that is unevenly distributed and closely tied to employment status. This enables plantation management to reduce financial liabilities while maintaining workforce control, thereby embedding inequality within the very structure of labour organisation.

Over time, such differential treatment becomes normalised within everyday plantation life. Women workers begin to internalise these distinctions as part of the work culture, particularly in contexts where hierarchical authority structures discourage collective resistance or questioning. This normalisation process ensures the reproduction of unequal labour relations, where temporary women workers remain at the margins of welfare entitlements despite their integral role in plantation production.

4. Non-Compliance with Provision of Maternity Leave

As per Chapter VI of Plantations Labour Act, 1951, workers shall be entitled to obtain maternity allowance in case if the woman is in confinement or expected confinement (Plantations Labour Act, 1951).

Information on sickness and maternity leave was obtained through interviews with women tea plantation workers and the management of both tea estates. The authorities reported that women workers were entitled to fourteen days of paid sick leave and nearly six months of maternity leave, divided between the pre-natal and post-natal periods. However, four temporary women workers from the T1 tea estate stated that

they were denied maternity leave on the grounds that their employment lasted only six months in a year. This indicates a clear exclusion of temporary workers from maternity benefits, amounting to a serious violation of women’s labour rights and revealing the conditional and uneven application of statutory entitlements.

The findings indicate that maternity entitlements are not uniformly realised but are mediated through employment status, which becomes a key organising principle of inequality within the plantation system. Although maternity protection is legally guaranteed, its actual implementation is shaped by the classification of workers as permanent or temporary, thereby producing differentiated access to reproductive rights within the same workplace.

This exclusion is enabled by the structural organisation of plantation labour, where temporary employment is designed in ways that externalise women’s reproductive needs from workplace responsibility. In such a system, maternity is not fully recognised as a labour-related entitlement but is instead repositioned as an individual or private responsibility of the woman worker. This redefinition allows the denial of maternity benefits to appear administratively legitimate within the existing labour structure.

The precarious position of temporary women tea plantation workers further reinforces this exclusion. Their dependence on short-term employment and continuous access to work for livelihood security significantly limits their ability to challenge such decisions or assert entitlements during pregnancy. In this context, reproductive health needs are subordinated to production priorities, where labour continuity is prioritised over social protection.

From a feminist political economy perspective, this reflects how the feminisation and casualisation of labour operate simultaneously in plantation economies. Women’s reproductive roles are structurally unaccommodated within flexible employment regimes, and maternity protection becomes contingent rather than universal. Moreover, since maternity leave entails wage payment without immediate labour output, exclusion of temporary workers serves to reduce managerial costs while preserving labour flexibility.

Over time, such exclusion becomes normalised within plantation life, where both institutional actors and workers may come to accept differential entitlement as standard practice. This normalisation renders structural inequality less visible, despite its significant consequences for women’s health, dignity, and long-term well-being. The result is a system in which maternity rights exist in principle but are unevenly realised in practice, particularly for the most insecure categories of women workers.

5. Non-Compliance with Provision of Sickness Leave

Under Chapter VI of the Plantations Labour Act, 1951, workers are entitled to sickness allowance upon certification by a qualified medical practitioner (Plantations Labour Act, 1951). The study also assessed the availability and usability of medical leave for

women workers. All fourteen women interviewed across the two tea estates reported that availing medical leave required the submission of a hospitalisation certificate. This condition effectively excluded instances where workers were unwell but required short periods of rest at home or outpatient treatment for two to three days. The women noted that medical leave was largely impractical, as their health needs often involved recuperation at home rather than hospital admission, even when advised by a doctor. Thus, while medical leave existed formally, its restrictive implementation rendered it largely inaccessible in practice. This points to a substantive violation of labour rights and underscores a mode of subordination that intensifies women workers' vulnerabilities within the plantation labour regime. The findings indicate that the operational definition of "illness" within the plantation system is narrowly constructed and institutionalised through administrative requirements. Only conditions requiring hospitalisation are recognised as valid grounds for leave, while short-term illnesses and preventive rest are excluded from consideration. This creates a structural gap between workers' lived health realities and the formal criteria used to regulate access to leave.

Such a framework shifts the burden of proof onto women tea plantation workers, who are required to demonstrate severity of illness in order to access entitled benefits. In doing so, sickness is transformed from a lived bodily experience into an administratively verified condition, thereby reducing the autonomy of workers in making health-related decisions. The requirement of hospital certification thus operates as a gatekeeping mechanism that regulates access to medical leave.

At the same time, the precarious economic position of women workers further constrains their ability to utilise such provisions. Dependence on daily wages and fear of wage loss discourage them from taking leave unless absolutely necessary. This creates a situation where women may continue working despite illness, thereby prioritising income security over health recovery.

From an economic perspective, such restrictive conditions also function as a cost-containment strategy. By limiting eligibility to cases of hospitalisation, the plantation system reduces the frequency of paid leave, thereby controlling wage-related expenditures. This reveals how labour welfare provisions are structured in ways that balance statutory compliance with cost minimisation.

Furthermore, women's health concerns—particularly those requiring rest and recuperation rather than clinical admission—remain structurally undervalued within the plantation labour regime. Over time, this institutional logic contributes to the normalisation of working through illness, reinforcing a labour culture where productivity is prioritised over health and well-being. The result is a system in which formal entitlements exist, but their accessibility is mediated by restrictive conditions that disproportionately disadvantage women workers.

Negotiated Agency Amidst Apathetic Management

The women tea plantation workers reported an indifferent and often inconsistent attitude of tea estate managers, whose frequent changes further contributed to uncertainty in workplace relations. Seven out of sixteen women workers also reported experiencing rude behaviour from managerial staff within the tea gardens.

P11: "We are all afraid of the manager, because he is very strict. Although it is a good thing, because this is the reason why the garden is in a good condition, but the problem is that, sometimes, we the women are not able to reach the tea garden on time, because we need to wake up early, finish up with all the household work, and the garden is also very far. Also, we never get timely drinking water. We are told to bring water bottles and biscuits from home. We bring our water bottle from home and use it till eleven, because by the time we get water, it is eleven. It takes a lot of time for us to reach as the garden is too far, but still, instead of 4pm, we are told to leave by 4.30 pm if we are late. We have a lot of things to say, but we stay silent as we don't want it to reach till our manager's ears. Everyone is afraid of him. He is extremely strict and rude. He says "You will not work and then you will come to me begging for money." If someone does not come for work, then he asks, "What did you come here for?" He becomes very rude. He doesn't even allow us to sit for some time in between our work. The manager also cuts our wages if we don't go. Suppose someone didn't go for work today, then she does not get the wages the next day. He speaks very rudely. In fact, our husbands also don't speak to us as rudely as much he does."

P12: "I am very scared of the manager. He is very strict. If any worker doesn't reach the garden on time, then the worker is sent back home and their wages are also deducted for that day. The problem is that, as we are women, we need to finish up with all the household duties before leaving for work. Also, the garden is located at a distance. Therefore, it takes time for us to reach till there. Not just me. Everyone is scared of the manager. He speaks very rudely when he is angry."

P13: "If we reach a little late then we get scolded, or sometimes Sir sends us back. These things happen... As the garden is at a distance from home, these things happen. We are sent back if we are late."

P7: "The manager comes to the garden in the morning in his car, and starts yelling as why anyone hasn't arrived yet. He says, "The 8 hours' time that you get is for your work, don't you know that you are supposed to work right now?" The problem is that, the tea garden where we work is located very far. So, it takes time for us to reach till there. Therefore, if we get late, he scolds us, and doesn't allow us to leave for home on time. He exceeds the working duration, if we get late. He also doesn't give us enough time to eat. We should get 1 hr lunch-break for eating, but we don't even get half-an-hour time. Sometimes, we just get 20 minutes. We also do not get drinking water for long durations. We hardly get any time to eat. He keeps yelling at us. Also, if we don't work, then we are not given any wages. If we are in

the need of money, even if we go till his office asking for it, he does not give. He does not give at all, no matter what. Our wages are so less, we hardly have any savings left with us; we need to educate our children as well. Still, even if someone, who doesn't have any savings left goes to him asking for money, he does not give. Sometimes, he also threatens us, that if we don't work, then we will not get our wages. If anyone reaches the garden late, then the manager sends them back and also doesn't provide them with the wages for that day. If someone is not well, then they get their wages if they come to the hospital, but if there is anyone else coming along with them, then they have to go to the garden for work, else their wage shall get deducted."

The narratives reflect that managerial authority is experienced not merely as administrative supervision but as a form of everyday disciplinary power embedded in the plantation labour system. The manager's role extends beyond work allocation into regulating time, movement, bodily needs, and wage security, thereby shaping a highly controlled work environment. Fear, rather than dialogue or negotiation, emerges as the dominant mode of workplace interaction.

This form of control is enabled by the structural hierarchy of the tea plantation system, where managerial authority is closely linked to decisions over wages, attendance, and job continuity. The workers' dependence on daily wages and limited access to alternative employment significantly constrains their capacity to contest managerial behaviour. As a result, disciplinary practices such as wage deductions, restricted breaks, and strict enforcement of reporting time function as mechanisms of labour control rather than isolated managerial decisions.

From a gendered perspective, these dynamics are further intensified by the intersection of work demands and unpaid domestic responsibilities. Women are required to complete household labour before joining plantation work, which directly affects punctuality and reinforces their vulnerability to punitive action. This creates a gendered temporal burden, where delays rooted in caregiving and domestic work are interpreted as indiscipline.

The accounts also indicate that silence and compliance are not passive responses but strategic adaptations within unequal power relations. Speaking out or challenging managerial authority is perceived as risky due to the possibility of wage loss or job insecurity. Consequently, women workers often negotiate agency through silence, endurance, and adjustment rather than over resistance.

While managerial strictness may be justified within productivity-oriented frameworks, the findings highlight that such control is experienced as disrespect and psychological pressure by workers. The absence of empathetic workplace practices, combined with rigid enforcement of rules, reinforces a climate of fear that undermines dignity and well-being.

Thus, the managerial behaviour cannot be understood solely at the level of individual conduct. It is embedded within a broader plantation system characterised by hierarchical authority, economic dependence, gendered labour burdens, and normalised disciplinary practices, where everyday disrespect becomes structurally sustained rather than incidental.

Non-Compliance with Work-Related Essentials

As per Chapter IV of the Plantations Labour Act, 1951, the employer shall ensure the provision to the workers of work-related essentials such as umbrellas, raincoats, blankets, and other amenities for protection from rain and cold (Plantations Labour Act, 1951).

During the interviews with women workers, eight out of sixteen reported not receiving essential work supplies. Women workers engaged on a temporary basis further shared that they were required to purchase basic work-related essentials on their own, as such provisions were largely restricted to permanent women tea plantation workers. This indicates a clear differentiation based on employment status and suggests only partial compliance with statutory provisions under the Act, while simultaneously increasing the financial burden on already low-paid workers.

The findings indicate that access to even basic work-related protections is structurally mediated through employment categorisation within the plantation system. The distinction between permanent and temporary workers operates as an administrative mechanism through which entitlements are selectively distributed. In this arrangement, "permanence" becomes the criterion for eligibility, thereby converting statutory welfare provisions into conditional benefits rather than universal entitlements.

This differentiation is enabled by the broader organisation of plantation labour, where segmentation of the workforce allows management to regulate costs and obligations. By limiting provisions such as protective gear to permanent workers, the plantation system reduces expenditure while transferring the responsibility of basic protection to temporary workers. For women already engaged in low-wage labour, this results in additional out-of-pocket expenditure, thereby deepening economic vulnerability.

From a labour process perspective, such exclusions are not merely administrative oversights but reflect a cost-management strategy embedded within the plantation economy. The classification of workers into permanent and temporary categories thus functions as a key mechanism through which welfare responsibilities are differentiated and minimised.

Over time, such unequal access becomes normalised within everyday plantation life. Temporary women tea plantation workers often adjust to these exclusions as part of routine work conditions, even when they are experienced as unfair. This normalisation is reinforced by the absence of alternative employment opportunities and the workers' dependence on plantation wages, which limits their ability to challenge such practices.

The findings therefore highlight how labour protections, though formally mandated, are unevenly realised in practice, with employment status serving as the primary axis through which inclusion and exclusion from basic work-related rights are determined.

Gender Disparity in Trade Unions

One of the women tea plantation workers from the tea estate (T2) reported gender disparity in leadership within trade unions.

P9: "Did you hear about the Assam Chah Mazdoor Sangh? We have it here. If there is a meeting then the women do participate, but the position of secretary is not given to any woman. However, they pay attention to the problems we share. At present twenty-one of us are a part of the union."

The absence of women tea plantation workers from key leadership positions, particularly that of secretary, indicates a persistent gendered hierarchy within trade union structures (Buragohain, 2023). Although women workers do participate in union meetings, their limited representation in decision-making positions constrains their ability to shape agendas, priorities, and outcomes. As a result, while women's issues may be acknowledged within union discussions, their articulation and prioritisation remain mediated through predominantly male leadership structures.

The findings suggest that participation and representation operate as distinct dimensions within trade union functioning. While women workers are formally included as members, decision-making authority remains concentrated in male-dominated leadership roles. This structural arrangement produces a gap between presence and influence, wherein participation does not translate into substantive power over decisions affecting workers' lives.

This imbalance is enabled through institutionalised leadership patterns within trade unions, where leadership positions are historically and consistently occupied by men. Such continuity reinforces a masculinised structure of authority that shapes not only decision-making but also the framing of issues considered important. Consequently, gender-specific concerns of women workers are often acknowledged but not fully integrated into collective bargaining priorities (Borah, Sharma & Dutta, 2026).

Power relations further shape women's engagement within these spaces. The ability of women tea plantation workers to assume leadership roles or speak assertively is constrained by both formal hierarchies and informal norms that privilege male authority in public negotiation spaces. In such contexts, women's participation is often limited to attendance or passive agreement rather than active agenda-setting.

Additionally, gendered divisions of labour in both domestic and plantation work restrict the time, mobility, and energy available for sustained union engagement. These structural constraints further reduce women's likelihood of assuming leadership positions, thereby reinforcing their marginal presence within decision-making processes.

Thus, the findings highlight that trade union participation alone is insufficient to ensure gender equity. Without transformation in leadership structures and decision-making power, women workers remain included in form but excluded in substance from influencing labour governance and advocacy.

The Vulnerability of Temporary Women Workers

The research highlights the heightened vulnerability and structural subordination of temporary women workers in comparison to their permanent counterparts. Employed for only about six months each year, temporary workers were systematically excluded from several statutory and welfare entitlements, including medical and maternity benefits, and were also required to arrange their own work-related supplies.

This differentiation is not incidental but is embedded in the organisational structure of plantation labour, where employment status functions as a key axis for allocating rights and entitlements. The categorisation of workers into "permanent" and "temporary" creates an institutionalised hierarchy through which access to welfare provisions becomes conditional rather than universal.

The absence of year-round employment security further deepens their economic precarity, as irregular income flows limit their capacity to absorb additional expenses arising from healthcare needs, maternity-related costs, or occupational requirements. In this context, exclusion from statutory benefits is not only a legal or administrative gap but also a mechanism that reinforces economic dependence and labour vulnerability.

From a labour regime perspective, temporary employment enables cost flexibility for plantation management, as it reduces long-term obligations related to social security, leave entitlements, and workplace provisions. This structural arrangement shifts the burden of welfare provisioning onto workers themselves, thereby intensifying inequality within the workforce. Over time, such differentiated treatment becomes normalised within plantation life, where temporary workers internalise their marginal position as part of the employment structure. This normalisation further limits collective resistance and sustains patterns of unequal treatment within the plantation labour system.

Discussion

The empirical realities documented in this study can be most coherently interpreted through the framework of feminisation of labour, which extends beyond the increasing participation of women in wage work to include the systemic restructuring of labour into insecure, devalued, and socially unprotected forms. The findings demonstrate that feminisation in the tea plantation economy is not a static or historical condition but a continuously evolving process, reproduced through institutional practices, managerial control, and differentiated access to statutory entitlements.

A central finding of the study—the persistence of meagre wages—reflects the continued ideological positioning of women's labour as secondary and replaceable within plantation

capitalism. However, this study extends existing scholarship by showing that wage suppression is not only a market outcome but is reinforced through institutionalised segmentation of labour between permanent and temporary workers, where wage-related vulnerabilities are intensified for temporary women workers through exclusion from benefits. This aligns with the broader governance failures highlighted in the Performance Audit on Implementation of Schemes for Welfare of Tea Tribes (Assam, 2024), which documents persistent gaps in enforcement of labour welfare provisions across tea estates. Thus, the “gap” between law and lived reality is not incidental but structurally produced through weak regulatory oversight and plantation-level discretion.

The study further demonstrates that feminisation operates through the gendered invisibilisation of embodied needs, particularly evident in the absence of accessible sanitation facilities. While official records claim adequate infrastructure, workers’ narratives reveal systemic non-functionality and inaccessibility (Khatoniar & Das, 2025). This contradiction indicates not only implementation failure but also a deeper governance logic where compliance is performative rather than substantive. The audit findings on welfare implementation similarly indicate that monitoring systems in tea estates remain weak and often fail to capture ground-level realities, enabling continued neglect of basic entitlements.

Importantly, the findings show that feminisation is being intensified through conditionalisation of rights, where entitlements such as leave with wages, maternity benefits, and sickness leave are made contingent upon employment status, documentation requirements, or restrictive verification processes. For instance, sickness leave is operational only under hospitalisation conditions, effectively excluding everyday illness and reinforcing disciplinary control over women’s bodies. Similarly, maternity benefits are denied to temporary workers on the basis of contractual duration, revealing how reproductive labour is excluded from institutional responsibility. These practices indicate a shift from overt exclusion to procedural exclusion, where rights formally exist but are practically inaccessible.

The study also highlights a less visible but significant dimension of contemporary feminisation: the emergence of negotiated agency under conditions of managerial authoritarianism. Women workers develop adaptive strategies to survive within systems characterised by wage deductions, surveillance, and time discipline. However, this agency is constrained and individualised rather than collective, shaped by fear of job loss and structural dependence on plantation employment. This reflects a shift in labour control mechanisms—from physical coercion to administrative and economic disciplining.

A further critical dimension emerging from the study is the weakening of collective bargaining structures. Although women participate in trade unions, their exclusion from leadership positions limits their ability to influence decision-making processes (Borah, Sharma & Dutta, 2026). This reinforces a gendered hierarchy within labour representation systems and reflects broader structural patterns of exclusion documented in plantation governance systems.

What emerges from these findings is not merely the continuation of feminised labour but its reconfiguration under neoliberal and managerial regimes of control, where exploitation is maintained through contractual fragmentation, bureaucratic barriers, and performative compliance with labour laws. The tea plantation system therefore does not simply reproduce older forms of feminisation; it actively deepens them through new mechanisms of invisibilisation, conditionality, and institutional neglect.

Conclusion

The lived realities of women tea plantation workers in Assam are embedded within deeply entrenched patriarchal structures and capitalist labour regimes that continue to shape their everyday experiences of work, dignity, and survival. The findings of this study demonstrate that women’s labour in tea plantations is characterised not only by economic precarity but also by systemic marginalisation through unequal access to statutory entitlements, restrictive institutional practices, and gendered control over bodies, time, and mobility. Despite formal legal protections, the translation of rights into practice remains highly uneven, revealing a persistent gap between policy and lived reality.

Viewed through a feminist and capability-based lens, these conditions reflect structural constraints that significantly limit women’s ability to exercise agency, expand choices, and achieve well-being. The intersection of gendered labour hierarchies, employment insecurity, and weak enforcement of labour protections collectively reinforces a system in which women workers remain positioned at the margins of recognition, protection, and decision-making. Their paid labour is inseparable from unpaid domestic and caregiving responsibilities, further intensifying their workload and constraining their opportunities for empowerment.

While the study proposes interventions such as rights-based awareness programmes, financial literacy initiatives, improved workplace infrastructure, gender audits, and stricter enforcement of labour laws, it is important to recognise that such measures operate within a historically entrenched plantation system shaped by long-standing relations of dependency, control, and institutionalised inequality. The persistence of managerial authority, contractual segmentation of labour, weak regulatory enforcement, and socio-economic dependence on plantation employment means that implementation of reforms is neither linear nor straightforward. Welfare provisions often remain conditional, unevenly enforced, or diluted through bureaucratic and organisational practices that are deeply embedded in plantation governance structures.

Moreover, the historical evolution of tea plantation labour in Assam has normalised hierarchies of gender, class, and labour control, making forms of subordination appear routine and socially acceptable over time. In such a context, even well-intentioned policy interventions risk being absorbed into existing structures without fundamentally altering power relations unless accompanied by sustained political will, institutional accountability, and collective worker mobilisation.

Thus, addressing the marginalisation of women tea plantation workers requires more than fragmented welfare measures; it demands a sustained transformation of structural power relations within the plantation economy. This includes strengthening enforcement mechanisms, ensuring accountability of plantation management, and creating institutional spaces that enable women workers' collective voice and representation. Only through such long-term and structurally grounded interventions can the embedded inequalities within the tea plantation system begin to be meaningfully challenged, paving the way for substantive rather than symbolic empowerment.

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Inclusion of Gender-Diverse Students in Higher Education: Institutional Preparedness and Policy–Practice Gaps in Kerala

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Abstract

This study examines institutional preparedness for the inclusion of gender-diverse students in higher education in Kerala, with particular focus on the gap between policy commitments and everyday institutional practices. Drawing on a qualitative research design, data were collected through Right to Information (RTI) responses, in-depth interviews, focus group discussions, and institutional observations and document analysis. The findings indicate a significant gap between policy commitments and institutional practices. Institutional preparedness remains inadequate across key domains, including administrative procedures, infrastructure, support systems, and curricular practices. Inclusion within the academic community is shaped by socio-cultural attitudes, interpersonal interactions, and institutional cultures, often characterised by stigma, conditional acceptance, and the persistence of binary gender norms. The analysis points to the need to move beyond formal compliance towards sustained institutional engagement with structural, cultural, and pedagogical dimensions of inclusion. By situating these dynamics within the Kerala context, the study contributes to a grounded understanding of how gender inclusion is negotiated within higher education in India.

Introduction

Gender inclusion in higher education has become a significant concern across global education systems. Inclusion, in this context, extends beyond formal access to encompass equitable participation, supportive institutional practices, and campus environments that enable all students to learn with dignity and a sense of belonging. Despite the expansion of higher education, gender diverse learners continue to encounter exclusion, discrimination, and unsafe learning conditions that limit their participation and overall academic experience. There remains a marked disparity between commitments to inclusive practices and their implementation within institutions.

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In India, the question of transgender inclusion gained constitutional recognition through the landmark judgement in the *National Legal Services Authority V Union of India*, which affirmed the right to self-identify one's gender and recognised transgender persons as a distinct category entitled to equality, dignity, and protection under the law. This was followed by the enactment of the *Transgender Persons (Protection of Rights) Act, 2019*, which places explicit responsibility on educational institutions to ensure non-discrimination and inclusive access. However, the existence of legal and policy frameworks has not automatically translated into inclusive institutional practices. As increasing numbers of gender-diverse students enter higher education, questions of recognition, safety, participation, and everyday interaction have gained prominence.

Kerala provides an important context for examining these dynamics. The state is often associated with relatively progressive social indicators and was the first in India to adopt a dedicated transgender policy in 2015. The transgender rights movement in Kerala, supported by community-based activism, played a major role in shaping these policy changes (Mallapur, 2017). The Kerala State Transgender Policy 2015 marked a shift towards a rights-based approach by recognising transgender persons as citizens entitled to dignity, access, and participation. The need for such policy intervention was underscored by the State Transgender Survey (2014–15), which estimated a transgender population of approximately 25,000 in Kerala and reported that a significant proportion had discontinued education before completing secondary schooling.

Subsequent initiatives in Kerala have included educational scholarships, financial assistance for accommodation, and reservation measures in higher education, alongside efforts shaped by sustained community-based activism. While these developments indicate a progressive policy environment, they also raise critical questions about how they translate into institutional practice within colleges and universities. Although existing research has examined transgender rights and access to education in India, limited attention has been paid to how institutional structures and everyday practices within higher education shape experiences of inclusion. There is therefore a need to understand how policies are interpreted, implemented, and negotiated within institutional settings.

Against this backdrop, this study examines institutional preparedness for the inclusion of gender-diverse students in higher education in Kerala, with particular attention to the gap between policy commitments and everyday institutional practices. Drawing on qualitative data from multiple institutional actors, the study explores how administrative processes, campus environments, and socio-cultural attitudes shape access, participation, and recognition. The study also aims to go beyond policy analysis and investigate the processes that lead to inclusion.

Defining Gender Diversity and Scope of the Study

This study uses the term “gender-diverse students” to refer to individuals whose gender identity or expression differs from the sex assigned at birth. This broader framing extends beyond the legal category of “transgender” to include non-binary, gender-fluid,

and other gender-diverse identities. It enables an examination of inclusion as a social and institutional process rather than a narrowly defined legal status.

In this study, institutional preparedness is understood as the capacity of higher education institutions to support gender-diverse students across infrastructure, administrative systems, pedagogical practices, and campus climate. This conceptual framing allows for an assessment of how inclusion is structured, experienced, and enacted within institutional settings. Higher education institutions engage with many of these individuals but do not always fully recognise them within formal policy structures.

Situating the Study within Existing Literature

Inclusive education refers to the capacity of educational systems to ensure the participation and success of all learners. UNESCO (2017) emphasises that this requires institutions to create environments responsive to diverse learning and social needs. In India, the *Transgender Persons (Protection of Rights) Act, 2019*, reinforces this commitment by mandating non-discriminatory educational environments for transgender persons. Section 2(d) of the Act further defines inclusive education as a system in which transgender students can learn alongside others without fear of discrimination, neglect, or harassment.

International research consistently documents the challenges faced by transgender and gender-diverse students in higher education, particularly experiences of discrimination, harassment, and inadequate institutional support, all of which negatively affect retention and well-being. Evidence from large-scale studies, including findings reported by Goldberg (2018), indicates that transgender students frequently experience campus-based harassment, with some discontinuing their studies. Similarly, Schneider (2010) highlights that limited institutional support and inaccessible environments contribute significantly to exclusion.

Research from India remains limited but points to similar structural and cultural barriers. Existing studies suggest that access to higher education does not necessarily translate into inclusive participation, as universities and colleges often remain inadequately equipped to address gender diversity (Chakraborty & Bose, 2022; Misra, 2018). Students report experiences of misrecognition, exclusion, and limited support, while faculty members and administrators often lack awareness of gender diversity. Curricular content also continues to reinforce binary understandings of gender, further marginalising non-conforming identities (Yadava & Bhattacharjee, 2022; Sunny & Deb, 2021).

India's higher education system is currently undergoing significant transformation, with policy frameworks such as the National Education Policy 2020 and guidelines issued by the University Grants Commission placing increasing emphasis on equity and inclusion. However, how gender inclusion is understood and addressed within higher education institutions remains under-examined in both research and policy evaluation. While legal and policy measures exist, there is a limited understanding of how these are translated

into everyday institutional practices. This study addresses this gap by examining institutional preparedness and campus-level experiences of inclusion, contributing to a grounded understanding of gender-diverse inclusion in higher education.

Research Design and Methods

This study adopts a qualitative research design to examine institutional preparedness for transgender inclusion and how gender inclusion is understood and enacted within higher education institutions in Kerala. A qualitative approach was considered appropriate for capturing the complexity of institutional practices and participants' perspectives in academic settings. A purposive sampling strategy was employed to select participants who are directly engaged with higher education institutions. The participants included administrators, faculty members, non-teaching staff, and students, enabling the study to capture multiple perspectives across institutional roles.

Data were collected using multiple methods to ensure depth and triangulation:

RTI Data: A Right to Information (RTI) application was filed with the Directorate of Collegiate Education, Kerala. Responses were received from 119 colleges and eight universities, providing institution-level data on enrolment and related administrative aspects.

In-depth Interviews: Semi-structured interviews were conducted with three college principals, eight faculty members, and seven non-teaching staff to understand institutional practices, perceptions, and challenges related to transgender inclusion.

Focus Group Discussions (FGDs): One FGD with faculty members and three FGDs with students were conducted to explore shared experiences, attitudes, and interactions within campus spaces.

Observation and Document Analysis: Campus visits were undertaken to observe institutional environments, and relevant documents, including policies, records, and reports, were reviewed to contextualise findings.

All interviews and discussions were transcribed and analysed using thematic analysis. This approach enabled the identification of recurring patterns and themes emerging from the data. The analysis was informed by interpretive perspectives on gender, institutional practices, and social attitudes, allowing for a contextual understanding of inclusion within higher education. Triangulation across data sources was used to enhance the credibility and validity of the findings.

Ethical considerations were strictly followed throughout the study. Informed consent was obtained from all participants before data collection, and confidentiality and anonymity were maintained in the reporting of findings.

Limitations

This study focuses on institutional responses and perspectives within higher education settings where transgender students are visibly present. As a result, it does not capture contexts where individuals have not disclosed their gender identity or remain outside institutional recognition. The analysis is further limited to arts and science colleges in Kerala, as other sectors of higher education reported limited or no enrolment of transgender students during the data collection period.

Findings of the Study

This section presents a thematic analysis of data collected through Right to Information (RTI) responses, institutional site visits, semi-structured interviews, focus group discussions, and document analysis. The findings are organised into two interrelated domains: institutional preparedness for transgender inclusion and socio-cultural and institutional dynamics of inclusion within the academic community.

Part 1: Institutional Preparedness for Transgender Inclusion

This section examines the extent of institutional preparedness for transgender inclusion within higher education. It focuses on structural and administrative dimensions, including enrolment patterns, policy frameworks, infrastructure, support systems, and access to academic and co-curricular spaces. The findings highlight how institutions translate policy commitments into practice through formal arrangements, resources, and initiatives aimed at supporting transgender students.

Enrolment Patterns and Retention within Institutions

In 2018, the Government of Kerala introduced a policy reserving two additional seats for transgender applicants in state universities and affiliated arts and science colleges, following advocacy by the State Transgender Justice Board. This has functioned as a critical entry mechanism for students who had previously disengaged from formal education (Kerala Higher Education Department, 2018). The policy is consistent with the direction of the Supreme Court in the *National Legal Services Authority v. Union of India (2014)* judgement, which explicitly identified discrimination in education as a major structural barrier facing transgender persons and directed state governments to extend reservation benefits to the community in educational institutions. For many students in this study, the reservation provision not only created a practical entry point but also rendered their gender identity visible within institutional spaces that had previously failed to acknowledge it.

Responses were received from 119 colleges and eight universities; however, only four universities and seven colleges reported the presence of transgender students. Further, information obtained through an RTI application shows that between 2017–18 and 2020–21, a total of 39 transgender students were enrolled in arts and science programmes across four universities. However, more recent observations reveal that this trend has not significantly improved, with many individuals continuing to conceal their gender

identity due to persistent stigma, discrimination, and fear of exclusion. Despite the impression created by this number indicating an increase in higher education access, disparities continue to exist, and the distribution is not evenly spread out across the regions but tends to be clustered. The majority of students are attending educational facilities based in urban areas that tend to be more liberal. Within the transgender community, internal hierarchies of visibility and marginalisation are evident. While transgender identities have gained increasing public visibility in recent years, this visibility is largely centred on trans women, leaving trans men relatively invisible and under-represented in both discourse and institutional recognition. Most students were concentrated in undergraduate programmes, particularly within the humanities and social sciences, which may be linked to constraints in accessing professional or technical courses, as noted in some participant accounts.

Retention of students in higher education institutions was still an issue. While most students remained enrolled in their programmes during the study period, a proportion withdrew or transferred, with indications that completion and degree attainment remained relatively low. Factors contributing to dropout rates included the pressing need for jobs, treatments in relation to gender reassignment procedures, and even disinterest arising from unsupportive institutional settings.

Institutional Policies and Administrative Frameworks

The study found that a large majority (98 per cent) of the institutions had not updated their internal policies to address transgender inclusion. In many cases, institutions justified this absence by claiming that existing policies were sufficient to address the needs of all students. General policy frameworks often exclude transgender students when institutions fail to acknowledge their specific barriers and needs.

The gap between policy and practice was particularly visible in the communication system between universities and affiliated colleges. In one case, a university had formulated a transgender inclusion policy, but affiliated colleges were unaware of it. Similarly, although the state had introduced additional seats for transgender candidates, most institutions were unaware of the reservation policy. Many colleges also lacked clarity about the documents required during admission, which led students to be asked for medical certificates, income proofs, or letters from the Social Justice Department.

Admission forms remained strongly binary. Only a small proportion of institutions had included a transgender option in their forms, and most were unaware that such an option was required or available. At the postgraduate level, forms continued to offer only male and female categories, which meant that transgender students were once again forced to select categories that did not reflect their identity. The problem did not end with admission. Service-related documents such as examination applications, fee challans, and participation forms also remained binary in most institutions.

Campus Infrastructure and Accessibility

The physical environment of the institutions remained largely binary. Gender-inclusive toilets and suitable hostel arrangements were rare. In one case, a designated toilet was available but so poorly maintained that students avoided it. In another institution, a staff toilet was later repurposed as transgender-friendly after a student made a specific request. A similar ad hoc response was seen when a student was shifted to a teachers' hostel with an adjusted fee structure. While such arrangements may have provided immediate safety, they also created separation from the wider student community. Institutional reluctance to make infrastructural changes was often justified in financial terms. One faculty member remarked:

"As the number of transgender students is very low, it is considered financially unfeasible for the university to modify infrastructure for them. The higher authorities are described as helpless and unable to take action."

The result is that transgender students are made to fit into existing spaces rather than institutions being redesigned to include them.

Campus Resources and Support Systems

Support systems were reported to be uneven and often dependent on individual staff members rather than structured institutional arrangements. Only a small proportion of respondents (approximately one-third) described their institutions as transgender-friendly, while most identified more broadly as student-friendly. In some cases, institutions highlighted general campus culture and participation opportunities as supportive of transgender students. For instance, a faculty member from a government college noted:

"Any marginalised section can thrive on this campus... We provide opportunities for transgender students to participate actively, particularly in campus events."

While mentoring through class tutors was available, it did not always result in sustained engagement with transgender students. Some tutors reported limited time to interact with students or hesitation in addressing gender-related concerns.

One tutor shared an instance where raising concerns about a student's class attendance led to a strong reaction, after which further interaction did not continue. In several cases, responsibility for student support informally shifted to female staff members. However, they also reported constraints due to teaching responsibilities and administrative workload.

As one faculty member noted:

"If we go and enquire about the issues of each student, it will complicate our jobs... We do not get time to meet students after teaching hours."

None of the institutions had a dedicated support cell for transgender students. Grievances were handled through general bodies such as the Board of Adjudication of Students' Grievances, which were not designed to address gender-specific issues. The study also found that institutions often minimised complaints of bullying or ragging and, in some cases, shifted responsibility onto the students themselves. The absence of a sensitive redressal mechanism leaves transgender students without a clear pathway for protection.

Access to Co-curricular Activities and Campus Participation

Participation in co-curricular activities uncovered yet another dimension of difficulty. Regarding sports and arts participation, institutions often acknowledged transgender students but rarely ensured their active involvement.

A few isolated efforts were reported, such as the introduction of separate gender categories in youth festival forms. However, these were described as limited and not uniformly implemented across institutions. A transgender student noted that the formation of a special category might simply result in making it "a category of one" and thus complicate rather than simplify participation. While some universities have taken steps to promote more inclusive participation in competitive activities, existing guidelines continue to restrict transgender students' involvement in programmes such as the National Cadet Corps (NCC) and National Service Scheme (NSS).

Political participation emerged as one of the more visible spaces of inclusion. Some transgender students successfully contested and won student union elections, demonstrating that they could participate not only as beneficiaries of policy but also as active leaders in campus life. However, the fact that these instances were viewed as exceptional rather than routine highlights the continued limitations in broader political inclusion and representation within higher education spaces.

Curriculum, Classroom Practices, and Sensitisation

Some faculties noted challenges in teaching topics that are traditionally framed within male–female classifications, especially in subjects such as statistics. At the same time, a few academic programmes had begun incorporating themes related to gender and transgender identities into the curriculum, including courses focused on gender politics. Faculty members involved in these revisions described their role in connecting academic content with student experiences.

However, some respondents indicated that institutions often confined awareness-related efforts to specific programmes or activities instead of integrating them into routine academic practices. As one faculty member noted:

"Although the work of community-based organisations is commendable, it focuses only on the community. We still have an 'us and them' feeling about their issues. We feel that this problem only affects a particular section, and we can do nothing about their issues. We need to reconsider what kind of inclusion is required."

Part 2: Socio-Cultural and Institutional Dynamics of Transgender Inclusion

This section examines how transgender inclusion is shaped and experienced within everyday academic life through institutional practices, social interactions, and campus culture. While institutional policies and provisions create a formal framework for inclusion, the actual experience of transgender students is shaped by interactions with peers, teachers, and the broader campus environment. The findings highlight how students, faculty, and institutions negotiate inclusion through daily practices, relationships, and informal institutional cultures.

Socio-cultural Attitudes and Challenges of Acceptance

Participants highlighted how families, peers, and wider society shape attitudes toward transgender persons. Family members often cautioned cisgender female students against forming close relationships with transgender students. One student explained:

"When we say that transgender persons are studying in our class, some people warn us, saying, 'Do not befriend them. Their friendship will affect you, and others will speak badly about you because of it.' This is the mindset of people around us. Such advice can come from friends, seniors, brothers, or anyone in society."

Some participants also reported hesitation in disclosing the presence of transgender classmates to family members due to anticipated negative reactions. Others noted that, in certain contexts, gender diversity was interpreted within families as a form of illness. Media, particularly television, were also described as influencing perceptions. As one student noted:

"Television shows can also harm our families. If you come from a conservative family background and enter an educational institution with a narrow mindset, you cannot accept a transgender classmate."

These accounts indicate that students' interactions within the campus are shaped by prior social influences, including family attitudes, peer networks, and media representations.

Participants also described differing institutional approaches toward transgender inclusion. In some cases, transgender students were treated in the same manner as other students, without specific attention to their needs. In other instances, respondents indicated that institutions tended to wait for formal directions before initiating inclusion-related measures.

Stigma, Prejudice, and Conditional Forms of Acceptance

While some institutions described themselves as supportive, participants' accounts indicated that inclusion was often conditional. In certain contexts, the presence of transgender students was treated as requiring special attention, particularly in managing interactions with other students. Some staff members reported the need to caution other students against inappropriate behaviour.

Cisgender students and some staff members also expressed hesitation in fully accepting transgender peers. Acceptance was often described as dependent on the student's conduct, appearance, and visibility in public spaces. One student explained how his attitude changed after encountering a transgender classmate outside the college setting:

"I accepted this change... [but] one night I saw my transgender classmate walking through the city streets... I felt bad seeing him at night with a transgender group. After that incident, I found it extremely difficult to get along with the student."

A faculty member similarly noted that non-acceptance was influenced by broader social attitudes, with some staff expressing discomfort when transgender students interacted with transgender communities outside the classroom.

Peer responses within the classroom also reflected hesitation. One student described the reaction of classmates when a transgender student was admitted:

"When we were informed about the admission of a transgender student in our class, two of the girls expressed concern. They said, 'Ayyo! Ingane ullathoke classil vannal engana?' (Translation: 'Gosh! How would it be if such people came to study in our class?'). Those girls were unwilling to interact with the transgender student. I defended the student by asking why they should be blamed for their situation. What exactly is their fault?"

Participants also described differences in how transgender identities were perceived. In some cases, students considered certain transgender individuals more "acceptable" than others based on their appearance and behaviour. One student explained:

"The transgender students on our campus looked nothing like those we usually see... Our transgender classmate is bold and stylish. She is well-dressed... They should try to behave normally."

Some staff members also linked acceptance to the way transgender students presented themselves and interacted within the campus environment.

Recognition and Validation of Transgender Identities

Participants described the difficulties students and staff experienced in recognising transgender identities as valid and legitimate. Even when transgender students used their preferred names and openly identified with a particular gender, peers did not always fully acknowledge these identities. One cisgender student explained that despite sharing accommodation, travelling together, and interacting closely with a transmasculine classmate, she continued to perceive the classmate as female. At the same time, she acknowledged that these interactions helped her develop a greater awareness and understanding of transmasculine identities, even though her personal perception of gender remained unchanged.

Faculty and administrative responses reflected similar patterns. One department head described engaging with a transmasculine student's identity through a biological lens:

"I was curious about the student because she is a girl who wants to be identified as a boy. I asked the student, 'Will she get pregnant if someone rapes her?' The student said, 'Yes!' and then I asked her, 'So, you are a girl, right?' The student said, 'No!' I will not marry, but I will give birth to a baby, and the baby will call me 'Dad'. He wanted to be a father to a child, not a mother."

A non-teaching staff member also described linking recognition to visible changes:

"Men are usually very bold, but this student behaves like a girl. For example, when we publish results on the notice board, he complains like the girls do. Initially, it was difficult for us to see the student differently. However, the student is now undergoing treatment, and we are trying to accept the change."

Participants' accounts also highlighted classroom practices related to recognition. Pronouns and names were not always used consistently, and some respondents noted that earlier names continued to be used in certain instances.

At the same time, some faculty members reported efforts to adopt more inclusive practices. One teacher explained:

"We have been calling them by their new name since the first day. We address them based on how they present themselves to us."

Another faculty member described changes in classroom language:

"In meetings, we usually address students as "vidyarthi-vidyarthinikale" (male & female students), but I now instruct others to use "vidyarthikale" (the unisex term for students). Otherwise, transgender students will stand out."

Some faculty members also reported difficulties in engaging with language and content that move beyond binary gender categories, particularly in subjects such as statistics.

Pathologisation and Medicalised Understandings of Gender Identity

Several participants described the persistence of views that interpret gender diversity through a medical or psychological lens. In these accounts, participants often interpreted transgender identities as forms of disorder or behavioural deviation.

One faculty member noted that such perspectives were present even among educated staff:

"The root of the issue lies in societal attitudes... They are often treated as having a psychological disorder rather than being understood in terms of their orientation."

Some faculty members in our department even believe that issues related to gender identity can be 'corrected' through harsh punishment."

Participants also referred to similar perceptions within family contexts. Some students reported that parents often viewed transgender identities as a form of "mental illness", which negatively affected their relationships within the family and, in some cases, also influenced how peers interacted with them on campus.

Allyship, Support, and Institutional Silence

Despite the challenges reported, some participants described changes in attitudes through direct interaction. One cisgender student noted that her perceptions shifted after developing a friendship with a transgender peer and participating in pride marches. She explained:

"...once I was able to engage with them directly, I found no difficulty in doing so."

Moreover, many participants highlighted that the reactions of teaching staff were often hesitant. They did not openly express their stance on transgender acceptance in their personal interactions. In some cases, institutions justified these actions as necessary to protect the institution's image and avoid complaints.

Participants also noted that some male faculty members were more likely to display such responses. Although several institutions projected an image of transgender inclusion, underlying attitudes often remained unchanged.

Discussion

The analysis reveals that the policy–practice gap operates across multiple interconnected domains, including institutional structures, socio-cultural attitudes, processes of recognition, and forms of participation within academic spaces.

Institutional Preparedness and the Policy–Practice Gap

The findings reveal a clear gap between formal policy commitments and institutional realities, indicating that inclusion remains incomplete despite the presence of progressive legal frameworks. Administrative procedures, institutional records, and campus facilities continue to operate within binary gender assumptions, limiting the recognition of gender diversity. These practices reflect the persistence of institutional cisnormativity, wherein organisational systems are structured around the expectation of only two genders. Recent research has emphasised that such institutional arrangements are not neutral but actively produce exclusionary environments (Horton, 2023). In this study, transgender students were often required to adapt to systems that did not acknowledge their identities.

The persistence of a policy–practice gap emerges as a central concern. In Kerala, institutional approaches to transgender inclusion are shaped by the interaction between state-level policy initiatives and national legal frameworks. However, the findings indicate that these provisions have not been consistently translated into institutional practice. Several institutions demonstrated limited awareness of policy measures, uncertainty about documentation requirements, and a reliance on general grievance mechanisms rather than gender-sensitive support systems.

Research in the Indian context (Yadava & Bhattacharjee, 2022; Sunny & Deb, 2021) similarly points to institutional unpreparedness and low levels of awareness as key barriers to effective inclusion. In this study, these gaps were reflected not only in administrative procedures but also in the absence of clear operational guidelines and dedicated support structures. This suggests that formal policy intent alone is insufficient to ensure effective implementation, which is instead shaped by institutional capacity, procedural clarity, and administrative engagement.

Socio-cultural Conditions Shaping Inclusion and Exclusion

The findings demonstrate that socio-cultural attitudes within academic spaces mediate inclusion. Acceptance of transgender students was often conditional and shaped by expectations of conformity to dominant gender norms. This reflects a form of conditional inclusion, where recognition is granted selectively rather than as a matter of right. Inclusion, in this sense, is contingent upon adherence to socially accepted norms rather than grounded in institutional guarantees. This pattern of conditional acceptance is often underpinned by deeper affective responses, including what Hill and Willoughby (2005, p. 533) describe as “emotional disgust toward individuals who do not conform to society’s gender expectations”, which continues to influence interpersonal interactions within academic spaces.

Influences beyond the campus further reinforce these dynamics. Family attitudes, peer networks, and media representations play a significant role in shaping perceptions of gender diversity. Participants described being warned against forming friendships with transgender peers and noted that gender diversity is often framed as a form of illness within family contexts. These findings indicate that higher education institutions in Kerala operate within a broader social environment where stigma is reproduced through everyday interactions and cultural narratives. Institutions, therefore, do not function in isolation but remain embedded within wider social systems that sustain exclusion.

Recognition and Validation of Gender Identity in Institutional Practices

Another significant finding relates to the limited recognition and validation of transgender identities. Misuse of pronouns, reliance on biological frameworks, and expectations of medical transition reflect the persistence of medicalised understandings of gender. These practices stand in contrast to the legal framework established by the NALSA judgement, which affirms self-identification without requiring medical validation. Recent studies have similarly critiqued the persistence of medical gatekeeping in institutional contexts,

noting its role in limiting recognition and reinforcing exclusion (Dutta & Roy, 2022; Ashley, 2019). Recent developments, including the *Transgender Persons (Protection of Rights) Amendment Act, 2026*, indicate shifts in the legal framework governing transgender rights in India. The move towards medical verification of identity has raised concerns about the erosion of self-identification as a principle of recognition.

The study also draws attention to internal disparities within the transgender community, particularly the relative invisibility of transmen students. Individuals assigned female at birth who identify as men often remain under-represented within institutional spaces. As noted by Petreena (2023), trans men experience a form of double marginalisation shaped by patriarchal gender norms and gender non-conformity, which helps explain their limited visibility and the lack of institutional recognition observed in this study.

The inadequacy of institutional support systems further illustrates this gap. Where mentorship and support were available, they depended largely on individual faculty members rather than structured institutional mechanisms. In the absence of dedicated transgender support systems, student concerns were often routed through general grievance bodies that were not equipped to address gender-specific issues. This reflects what Siegel (2019) describes as institutional “microclimates”, where support is uneven and dependent on isolated pockets of goodwill, resulting in precarious forms of inclusion.

Participation and Negotiation in Constrained Institutional Spaces

The findings indicate that transgender students are not merely passive recipients of institutional policies but active participants in shaping their educational experiences. In some universities and colleges, opportunities for transgender inclusion have been introduced in both curricular and co-curricular domains such as student union elections, classroom discussions, and cultural or youth festivals. These forms of participation reflect emerging institutional openings that enable visibility and involvement. However, these opportunities remain unevenly implemented and are embedded within organisational structures that continue to privilege binary gender norms.

Despite increased access, participation is often negotiated within constrained institutional frameworks. Spaces such as sports, NSS, and NCC continue to operate through rigid gender binaries, limiting inclusion. In such contexts, students are required either to conform to predefined categories or withdraw, restricting the exercise of self-determination. The case of *National Cadet Corps & Ors. v. Hina Haneefa & Ors.* is significant, as it affirmed the right of a transgender woman to enrol in the NCC under the female category. This judgement illustrates how judicial intervention can challenge institutional rigidity and expand participation when administrative systems fail to accommodate self-identified gender. However, the reliance on such external mechanisms underscores the limits of institutional responsiveness and the conditional nature of inclusion.

At the level of everyday institutional practice, inclusion is shaped through micro-level interactions. Faculty members who used inclusive language, integrated gender diversity into the curriculum, and demonstrated respectful engagement contributed to more enabling classroom environments. Peer interactions also facilitated emerging forms of allyship, indicating that attitudes can shift through sustained engagement. However, these processes remain fragmented and dependent on individual initiative rather than being structurally embedded.

Conclusion

This study examined institutional preparedness for gender inclusion and how higher education institutions in Kerala understand and negotiate inclusion. The findings highlight a clear gap between policy commitments and their translation into institutional practice. While existing legal and policy frameworks have enabled formal access and recognition, their implementation within institutional structures remains incomplete.

Institutional preparedness was limited across several domains, including administrative procedures, infrastructure, support systems, and curricular practices. Many institutional processes continue to operate within binary assumptions about gender, with limited adaptation to the needs of gender-diverse students. Where supportive practices were observed, they were often informal and dependent on individual initiative rather than embedded within institutional frameworks, resulting in inconsistent and fragmented responses to inclusion.

The study also shows that inclusion within higher education is shaped not only by institutional arrangements but also by socio-cultural attitudes within the academic community. Broader social norms influenced perceptions of gender diversity, which often manifested as stigma, conditional acceptance, and expectations of conformity. These dynamics indicate that inclusion is not a fixed institutional outcome but an ongoing process negotiated through everyday interactions and institutional cultures.

The study points to the need for a shift from policy-driven access to sustained institutional engagement with the structural, cultural, and pedagogical dimensions of inclusion. This includes revisiting administrative procedures, strengthening support systems, integrating inclusive approaches within curricula, and fostering institutional environments that move beyond binary frameworks. Instances of inclusive practices, such as shifts in classroom language and emerging forms of engagement, suggest that institutional change is possible. However, such efforts remain limited in scope and cannot substitute for systematic institutional commitment. This study contributes to a context-specific understanding of gender inclusion in higher education and highlights the importance of aligning institutional practices with broader commitments to equity and inclusion.

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Rethinking the Notion of 'Place and Placelessness' in the Experience of Migrant Workers in West Bengal During Covid-19 Pandemic

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Abstract

This study examines the concept of "Placelessness" in relation to migrant workers in India, drawing on the theoretical framework of Edward Relph. While the home state represents "Place," destination states such as Gujarat, Maharashtra, and Delhi—are often perceived as "Placeless" due to socio-economic and cultural alienation. Migration in India is primarily driven by regional economic disparities, unemployment, and the search for improved livelihood opportunities. However, the COVID-19 pandemic and subsequent lockdowns disrupted informal migratory patterns, forcing many migrant workers to return to their home states. In contemporary India, migrant workers frequently work under precarious conditions characterised by informal employment, limited social protection, and economic insecurity. These vulnerabilities became particularly visible during the nationwide lockdown, when millions of migrant workers were left without employment, shelter, or adequate state support. Using a phenomenological approach, the study investigates two key questions: first, what characteristics contribute to migrant workers perceiving their destination as placeless? Second, how do these destinations evolve into placeless landscapes over time? The study conceptualises destination states as mediated spaces, shaped by both economic opportunities and socio-cultural displacement. It argues that placelessness is not merely an absence of place but a dynamic interplay of human aspirations and structural transformations. By highlighting the lived experiences of migrant workers from West Bengal, the study contributes to contemporary debates on place and placelessness by demonstrating how migration produces complex spatial experiences shaped by economic opportunity and socio-cultural displacement.

Introduction

On January 30, 2020, the first coronavirus (COVID-19) case was reported in India. Due to its contagious nature, limited medical preparedness, and large population size,

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the Government of India imposed a nationwide lockdown on March 25, 2020. Initially announced for 21 days, the lockdown extended to May 31st, 2020 through several phases. Although it helped the Government control the disease's spread and reduce transmission in the community, it had an impact on the economy and caused severe economic disruptions across multiple sectors and social groups.

Economically marginalised populations have suffered, particularly migrant workers employed in different parts of the country. According to the World Bank (2020), lockdowns, job losses, and social isolation "prompted a chaotic and traumatic process of mass return for internal migrants in India and many countries." On March 28, 2020, when the entire country saw hundreds of migrant workers stranded at bus terminals, railway stations, and other public locations. Over time, more distressing images and accounts of migrant workers travelling long distances to get home across states were shared with the public.

Many migrant workers have suffered, particularly those who are uneducated and work in informal sector. During the lockdown, both the Central and State Governments faced significant challenges in providing adequate support to these vulnerable workers. There is nobody to fall back on for the group of migrant workers, who depend heavily on daily wages. Even the Central and State Governments currently lack accurate information about migrant workers. In response to a starred question in the Lok Sabha, the Ministry of Labour and Employment was unable to provide a satisfactory response to the following questions:

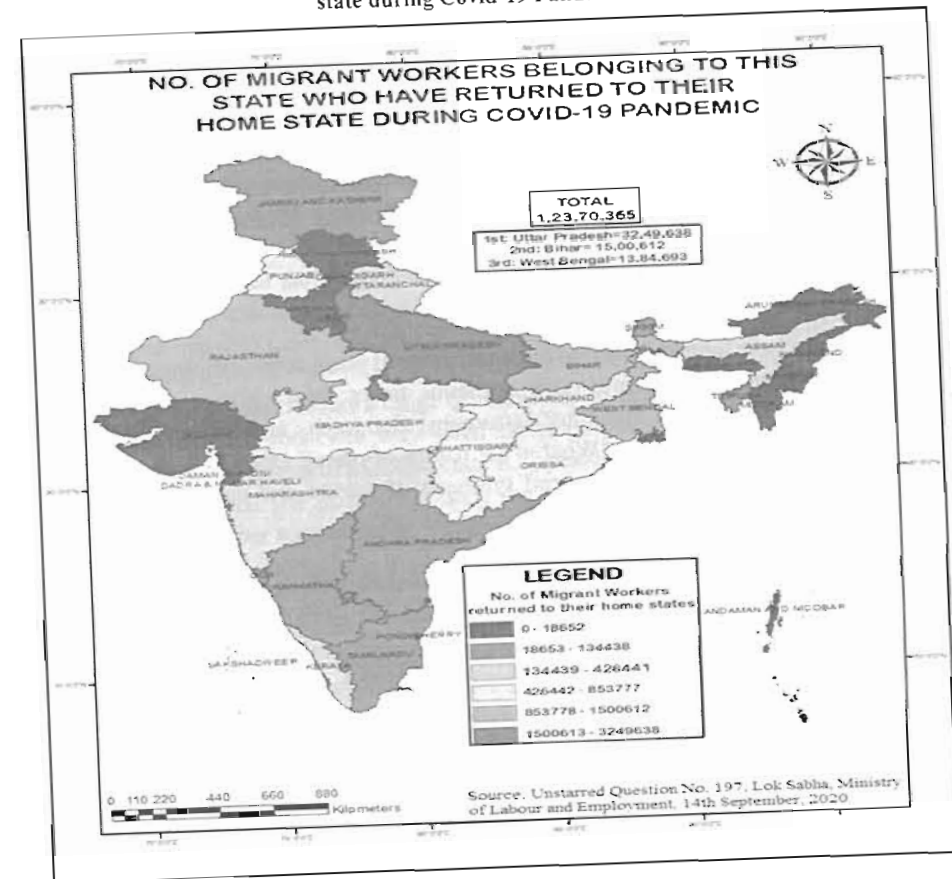
1. Whether the Government of India is worried about the loss of employment, in particular for migrant workers throughout the country;
2. If so, whether or not the Government has conducted any study in order to determine the number of workers who were lost their employment due to the Covid-19 pandemic;
3. If so, what are the details of it and all the policy measures the Government has made to help the affected workers?

The then Union Minister of Labour and Employment, Mr. Santosh Kumar Gangwar, provided preliminary information regarding the number of migrant workers who returned to their home states in response to an unstarred question no.-197 that was raised in the Lok Sabha (Lower House of the Indian Parliament) on September 14, 2020. Figure 1 was created using data showed the proportion of migrant workers from the state who returned to their home states during the pandemic.

Figure 1 makes it clear that Uttar Pradesh (3249638) has the largest number of migrant workers. Gujarat, Himachal Pradesh, Uttarakhand, and the North Eastern States record the lowest numbers. However, in terms of the number of migrant workers, Bihar (1500612), West Bengal (1384693), and Rajasthan (1308130) are in second, third, and fourth place, respectively. Against this background, the present study examines migrant labour mobility through the conceptual lens of place and placelessness. It argues that

while economically developed destination states such as Delhi, Maharashtra, Gujarat, and Karnataka attract migrant workers because of better livelihood opportunities, these locations are often experienced as socially and culturally alienating spaces. Consequently, migrant workers frequently experience destination regions simultaneously as sites of economic opportunity and landscapes of placelessness.

Figure 1: Number of migrant workers belonging to this state who have returned to their home state during Covid-19 Pandemic



In the Indian migration context, economically developed states such as Delhi, Maharashtra, Gujarat, and Karnataka function as major destination regions, while states such as Uttar Pradesh, Bihar, and West Bengal continue to act as major source regions of migrant labour. In a nation like India, there is a persistent and severe regional disparities between the various states, especially between the Eastern and Western States. These states attract a large number of migrant labourers seeking improved economic opportunities in pursuit of improved livelihood opportunities. These migrant workers may exhibit a number of placeless characteristics, but they seem to view their destination regions as economically desirable. What is it about these locations and the experiences they offer, then, that attract migrant workers in large numbers?

The current study provides important new insights into Relph's idea of "Place and Placelessness" to address this question. He maintained that places cannot be understood independently of human experience and must instead be investigated in terms of how people perceive them (Relph, 1976, p.43) and conceptualised places as "the significant centers of our immediate perceptions of the world". His theories are fundamental to migration studies because they situate the experience of migration as a difficult process of meaning-making that transforms a location into one that has particular significance for the person experiencing it. In light of this, the purpose of the research is to comprehend the perceptions and interpretations migrants attach to their migration experiences to the states of their destination. This study is guided by three specific research questions: first, what is the trend of out-migration from West Bengal and what causes this outmigration from West Bengal? Second, what adverse experiences do West Bengali migrant workers have when they return to their home state after working there? Third, despite experiences of placelessness, why do these destination regions continue to attract migrant workers over time?

Place in Geography

Geographers have long emphasised the importance of place as the defining characteristic that sets geography apart from other academic fields. Space is a concept addressed across several disciplines, including Astronomy, Geography and History. Geographers must now consider the issue, "What is the nature of place? Does it merely describe a location, or does it describe a special synthesis of culture and nature, or could it be referring to something quite different?

Beginning in the early 1970s, geographers expressed discontent with what they regarded to be a philosophically and experientially deficient understanding of place, notably Yi-Fu Tuan (1975), Anne Buttimer (1976), and Edward Relph (1976). These scholars, often known as "Humanistic Geographers," examined the significance of place in human experience. One notable result of this new theoretical approach was Edward Relph's 1976 book "Place and Placelessness," which has had a considerable theoretical and practical impact both inside and outside of geography. As his project progressed, he became dissatisfied with the concept of place's lack of conceptual depth. Relph thought that this stated conceptual underpinning of the field was shallow and deficient in light of the importance of place in ordinary human life. How could scholars examine place attachment, a sense of place, or identity in a place without having a deep understanding of the richness and complexity of place as it is experienced and generated by actual individuals in real places?

Place and Placelessness

Edward Relph's 1976 book "Place and Placelessness" is a foundational scholarly work. His methodological approach is "a phenomenology of location," as he emphasises at the book's introduction (Relph, 1976, pp.5-7). Phenomenology is the philosophical and methodological study of lived human experience. The objective is to examine and clarify human situations, events, meanings, and experiences as they are known in

daily life but below the level of conscious awareness (Seamon, 2000). One of the most powerful tools of phenomenology is the ability to identify taken-for-granted aspects of lived experience and then confront it. To reveal these implicit structures of experience, we must dissociate from any assumed attitudes and presumptions, whether they relate to actual experience or to conceptual viewpoints and explanations, including scientific ones. In "Place and Placelessness," Relph critically examines on the commonly held notion that place is a crucial aspect of human experience and life. Relph presents Place and Placelessness by going over space and its relationship to place. He argues that space is not an abstract spatial void, an isometric plane, or a certain kind of container that holds places. Instead, he contends that in order to evaluate the relationship between space and a more experientially oriented understanding of place, space must also be investigated in terms of how individuals perceive and experience it. Although Relph claims that there are many different forms and intensities of spatial experience, he also proposes a heuristic continuum based on "a continuum with direct experience at one extreme and abstract reasoning at the other" (Relph, 1976, p. 9). He identifies immediate, perceptual and embodied forms of spatial experience such as pragmatic space, perceptual space, and existential space on the one hand. Additionally, he makes a distinction between more abstract and conceptualised, abstract, and intellectual types of spatial experience like planning space and cognitive space. According to Relph, each of these spatial modalities has a range of intensities in daily life. Existential space can be felt in a very self-conscious way when individuals experience profound emotional and symbolic engagement of a Gothic church, for example. It can also be felt subtly and unconsciously when one occupies routine everyday environments and pays minimal attention to his or her surroundings. Existential space is the implicit spatial structure of everyday life of a person's daily environment, rooted in their culture and social milieu.

While each of the recognised spatial modes serve distinct experiential functions, Relph emphasises that in reality, these modes are all essential components of human spatial experience as a lived, indivisible whole. He analyses, for instance, how cognitive concepts of space learned via maps may aid in the development of our sensory knowledge, which in turn may affect how individuals interact with spatial environments during everyday spatial movement. When scholars talk about spatial modes like hallowed space, gendered space, commodified space, and the like, they now widely accept Relph's proposition.

One of the book's key theoretical contributions is Relph's conceptual engagement with place and space. Although these concepts are discussed frequently by geographers, they are either treated as separate concepts, or their intellectual and existential linkages is provided. Relph claims that a place's ability to geographically arrange and concentrate human intentions, sensations, and actions is what constitutes its distinctiveness. Relph argues that space and place have a dialectically organised connection in human experiences of nature because our sense of space is tied to the places we live in, that in turn derive meaning from their physical surroundings.

Place

Relph's in-depth exploration of place was largely inspired by his theoretical position that it could contribute to the preservation and creation of new places as well as the maintenance and repair of ones that already exist (Relph, 1976). He argues that without a thorough grasp of place and its significance to people, it would be difficult to explain why a specific location is significant and impossible to know how to restore degraded places. When Relph explores location in depth, he focuses on how individuals relate to and identify with it. Having a "permanent sameness and unity that permits that place to be distinguished from others" is how he describes a place as having an identity (Relph, 1976, p.45). This persistent identity is broken down by Relph into three components: 1) the physical environment, 2) the actions, situations, and events that occur there, and 3) the personal and societal meanings that are formed from those experiences and intentions.

However, Relph emphasises that places are "important centers of our immediate experiences of the world," therefore this three-fold description of a place is insufficiently pivotal or profound existentially. To understand places more thoroughly, we need a language that enables us to express specific place experiences in terms of the degree of meaning and intention that a person and a place possess for one another. The foundation of this experienced intensity, according to Relph, is the degree of attachment, participation, and worry that a person or group has for a specific area.

Placelessness

Relph looks into how a place could be truly experienced. An authentic feeling of place is defined as a direct and genuine encounter with the entire complex of a place's identity, not altered and deformed by means of a series of somewhat arbitrary social and cerebral fashions about how the experience ought to be, nor adhering to stereotyped conventions (Relph, 1976, pp. 46-48). A sense of place can be actively or accidentally created by both individuals and groups. This means that a simple urban neighborhood can be legitimate as Gothic cathedrals or Hellenic Athens, each of which, for Relph, are examples of places that were purposely made. Relph asserted that in our contemporary era, a true sense of location is progressively being supplanted by a less true attitude that he dubbed Placelessness. This is what he refers to as "the casual eradication of distinctive places and the making of standardised landscapes that results from insensitivity to the significance of place" (Relph, 1976, p.90).

Relph contends that the primary factors of Placelessness as a whole are "Technique" and "Kitsch," or the uncritical adoption of popular values. The combined impact of these two pressures is described as "undermining place for both individuals and cultures, and casually replacing the diverse and significant places of the world with anonymous spaces and exchangeable environments" (Relph, 1976, pp.91-92).

Materials and Methods

The current study is primarily based on secondary data. As previously indicated, the current study, which is based on Relph's concept of "Place and Placelessness," offers unique insight about the experience and conditions of migrant workers in West Bengal during the Covivirus-19 Pandemic. Relph's theoretical framework was largely founded on migration studies since he believed that migration is a challenging process that transforms a region into one that has special value for the individual experiencing it. So, this study was totally based on the migration data and socio-economic data that triggered the process of migration from time to time. The analysis has been carried out with secondary data from Census of India. Migration data from the census has been used since 1991, 2001, and 2011, or for three decades. The 2011 Census data is used to obtain socio-economic factors such population density, literacy rate, and the proportion of workers in the agricultural and non-agricultural sectors. The Human Development Report from 2021 served as the source for the Human Development Index's values. Gross State Domestic Product (GSDP) in Indian Rupees for the year 2019-20 and Net State Domestic Product (NSDP) at current prices for the year 2018-19 both has been taken from Economic Survey Statistical Appendix 2022-23. Unemployment rate for September, 2022 has been taken from Centre for Monitoring Indian Economy (CMIE) data and National Multidimensional Poverty Index has been collected from NITI Aayog, 2021 Report which is based on the National Family Health Survey-4 (2015-16).

First, the research has calculated the in-migration rate and out-migration rate from West Bengal. GIS technology has been used to project the gender distribution of migrants, the flow of inbound and outbound migration to and from West Bengal, respectively. After all, the economic drivers of migration are used to explore the concepts of "Place and Placelessness".

The In-Migration and Out-Migration Rates are calculated by:

In-Migration Rate = $(\text{Volume of in migration to the state} / \text{Enumerated population of the destination state}) \times 100$

Out-Migration Rate = $(\text{Volume of out migration from state} / \text{Enumerated population of the origin state}) \times 100$

Apart from these, Karl Pearson Correlation has been employed to determine the relationship between out migration and some development indicators for the state of West Bengal. For correlation analysis, two migration variables have been considered as dependent variables. They are: a) The rate of Out-migration from West Bengal and b) Proportion of people out-migrated due to economic reasons like work or business from West Bengal. To establish the relationship between development and migration, nine development variables have been considered as independent variables. They are: 1) Population Density in Sq. Km (2011), 2) HDI (2021) by UNDP method, 3) GSDP in Indian Rupees (Lakh) (2019-20), 4) Unemployment Rate (CMIE Data) Sep, 2022, 5) Literacy Rate (%) (2011) 6) Multidimensional Poverty Index 7) Net State

Domestic Product at current prices (2018-19), 8) Percentage of workers engaged in the agricultural sector (2011) and 9) Percentage of workers engaged in the non-agricultural sector (2011).

After all, after analysing the experience of migrant workers of West Bengal available from various newspaper article a keyword analysis has been calculated and drawn, from which the psychological understanding of the migrant labourers can be gauged out.

Migration Scenario of West Bengal

West Bengal functioned as a net in-migration region before independence, but subsequently transitioned into a net out-migration region. Data from three Census decades' in-migration, out-migration, and net migration rates have been examined here.

The in-migration rate to West Bengal has fallen over the past ten years, from 31.1 in 2001 to 26.74 in 2011, but female in-migrants remain significantly higher than male migrants, primarily due to short-distance marital migration. Between 2001 and 2011, there has been a significant decline in in-migration from the northern region. Bihar (12.59%), Jharkhand (5.08%), Uttar Pradesh (2.74%), and Odisha (1.59%) attracted the most in-migrants from the northern area in 2011. There have been relatively low levels of in-migration were recorded from the western and southern regions.

The total number of migrants departing West Bengal divided by the state's population of 1000 is the out-migration rate. From 1991 to 2011, the out-migration rate significantly increased, from 1.66 to 27.73, with a concentration in the northern and western regions. Figures 2, 3, and 4 show that the out-migration rate increased rapidly, with Maharashtra (3.75%), Delhi (2.08%), and Uttar Pradesh (2.68%) experiencing substantial out-migration flows in 2011 (Figure 4). In 2011, the eastern area of Jharkhand (5.51%) and Bihar (2.46%) saw the greatest female outmigration rates (Figure 4). This is primarily attributable to marriage-related migration of females to nearby states to nearby states. Between 1991 and 2011, a noticeable rise in emigration was also observed towards the southern region. In the early stages of the liberalisation process, southern states adopted liberalisation policies earlier and benefited from expanded employment opportunities, while West Bengal experienced comparatively slower employment growth (Banerjee and Das, 2021).

West Bengal's net migration rate significantly dropped from 1.86 in 1991 to 1.44 in 2001 and then to -1.02 in 2011. In 1991, there was a noticeable positive net migration rate from the northern (2.05) and southern (0.05) regions, indicating higher in-migration to West Bengal to West Bengal from the north and south. Later, starting in 2001, net migration turned negative, indicating an increased net out-migration from West Bengal to the north and south (Banerjee and Das, 2021).

With respect to migration motivations, there is a pronounced gender difference- male migration is predominantly driven by economic factors, while female migration is primarily driven by marriage. Following marriage, the majority of women migrate to the

east because of prevalent patterns of cross-border marital migration with neighbouring countries. Male migrants from West Bengal are predominantly concentrated in western regions for economic reasons. The second most common reason for both male and female migrants to migrate is due to associational factors, such as accompanying parents or other family members. Most migrants from West Bengal with their families have settled in the eastern and central regions.

Figure 2: Out-Migration Rate from West Bengal to other states in 1991

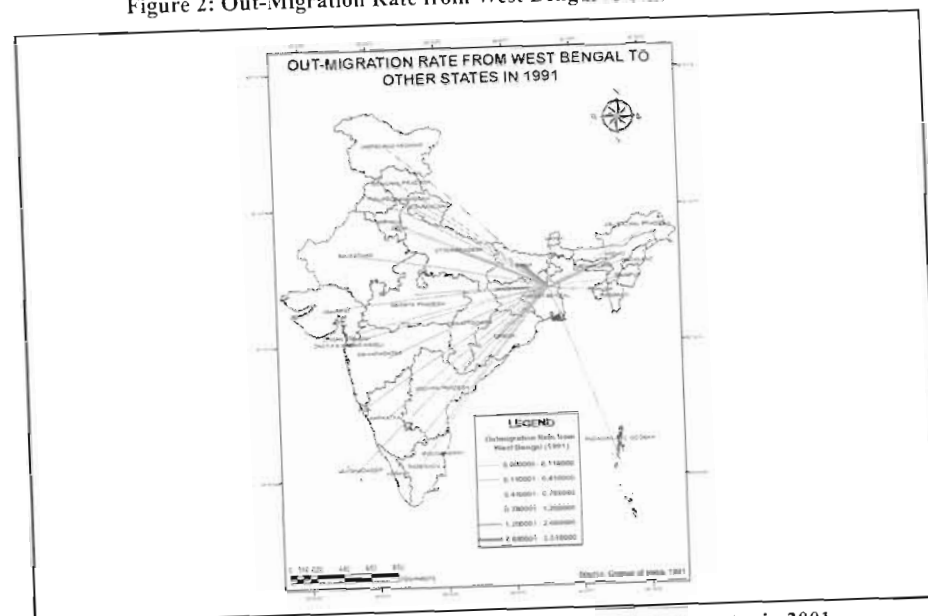


Figure 3: Out-Migration Rate from West Bengal to other states in 2001

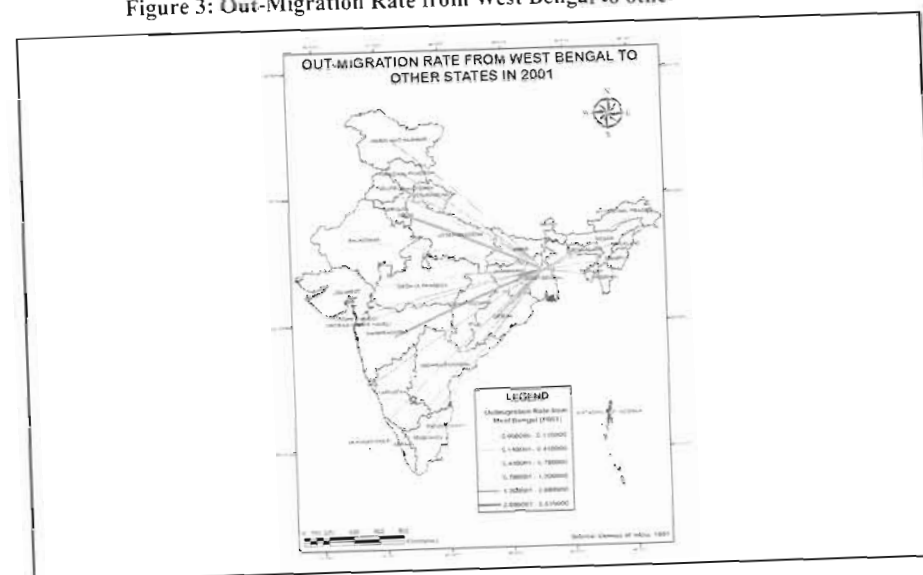
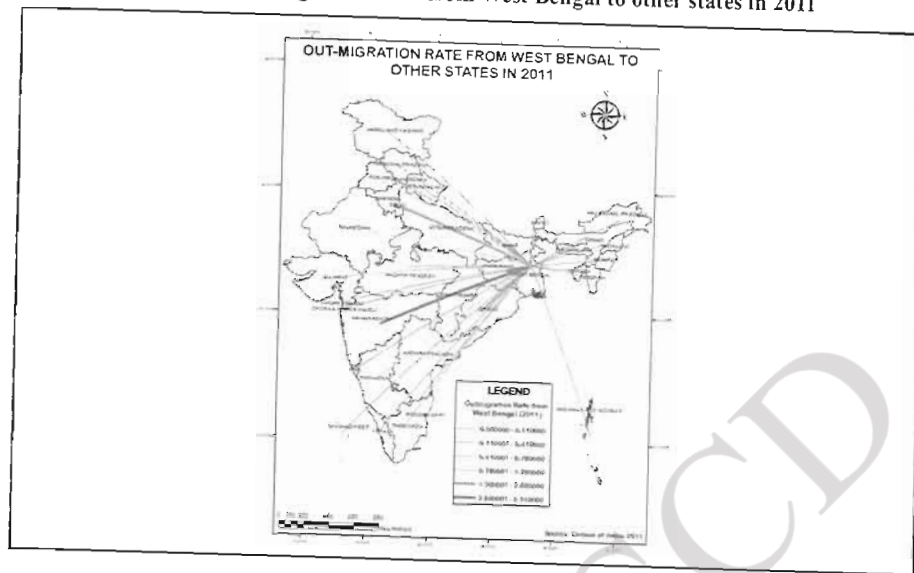


Figure 4: Out-Migration Rate from West Bengal to other states in 2011



Out-migration Due to Economic Reasons

The 1981 Census was the first to collect data on migration causes based on last place of residence. In 1991, the causes of migration were categorised into seven main groups: business, education, marriage, family relocation, work/employment, and natural disasters. As many women returned to their parental homes or to locations with better medical facilities during childbirth, natural disasters were eliminated in 2001 and a new category, 'moved after birth' was created.

The primary variable in the study is out-migration from West Bengal driven by economic factors such as employment and business opportunities. The out-migration flow from West Bengal to other states for economic reasons has been illustrated in Figures 5 and 6, which show that the migration flow is increasingly significantly from 2001 to 2011. In 2011, Delhi (10.1%) and Maharashtra (23.0%), received the highest proportion of migrants from West Bengal for economic reasons. It has been observed that that the out-migration rate due to economic reasons has been significantly decreasing in Delhi from 15.2% (2001) to 10.1% (2011) and Jharkhand from 11.1% (2001) to 9.1% (2011) mainly due to employment constrains. Over that decade, there was a significant increase in the number of migrants from West Bengal for economic reasons to the western and southern regions.

Figure 5: Total Out-Migration Rate due to Economic Reasons from West Bengal to other states in 2001

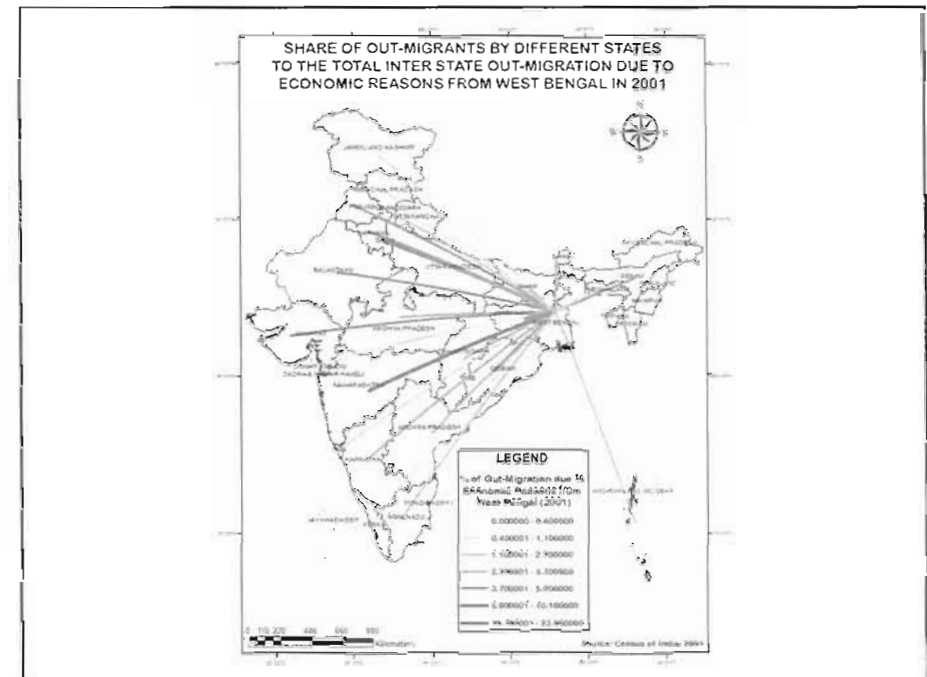
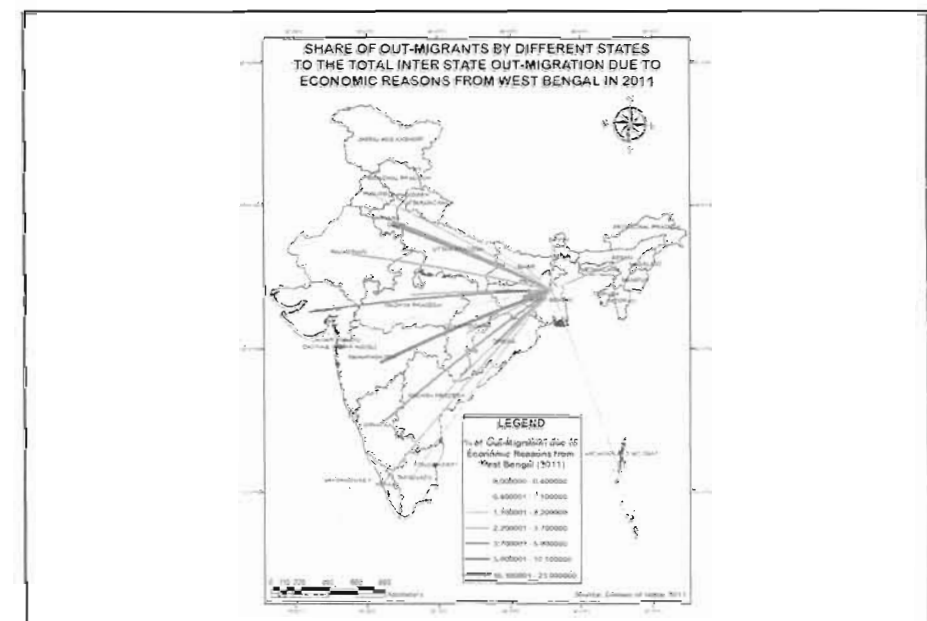


Figure 6: Total Out-Migration Rate due to Economic Reasons from West Bengal to other states in 2011



To understand the effect of regional development disparities on migration some variables have been identified on the basis of literature reviewed in this study.

1. Population density (Sq. Km)- It is an excellent indicator of both natural growth and growth driven by net inward migration; therefore, it can be used as an indicator. Bihar has the greatest population density among the states (1102 people per square kilometre), followed by West Bengal (1028 people per square kilometre) and Kerala (859 people per square kilometre). Among the union territories, Delhi (11297 people per sq. km) has the highest density, followed by Chandigarh (9252 people per sq. km), Puducherry (2598 people per sq. km), and Daman and Diu (2169 people per sq. km).
2. Human Development Index (2021)- It is a composite indicator of average performance in the three main areas of human development—living a long, healthy life, educational attainment, and enjoying a fair level of living. It is the average of the normalised indices of the three dimensions. (UNDP). Kerala (0.752) and Chandigarh (0.744) are the two UTs with the highest HDIs. Bihar (0.571) ranks lowest in terms of development.
3. Gross state domestic product (GSDP) at a constant price (2019-20)- It serves as a crucial economic development indicator. It is determined by adding together the total value added by all economic sectors. According to the Directorate of Economics, GSDP at constant prices is used because it captures the actual change in output. In comparison to all other regions, north-eastern states of India have a lower GSDP. The greatest GSDP among the states was reported in Maharashtra (281855457), whereas the highest GSDP among the UTs was registered in Delhi (83087249).
4. Unemployment Rate (CMIE) (Sep., 2022)- It is another important indicator of development. In India, there is a significant regional variance in the unemployment rate. Rajasthan has the greatest rate of unemployment among the states (23.8%), whereas Delhi has the highest rate among the UTs (9.6%).
5. Literacy rate (2011)- To understand the socio-economic development of the area, it is crucial to take this measurement. The number of literates is calculated by dividing it by the state's total population, which is multiplied by 100 to obtain the percentage. Lakshadweep (81.5%), Kerala (84.2%), and Karnataka (79.9%) are the states and UTs with the highest rates of literacy. In comparison to the other parts of the state, the southern region has a greater literacy rate. The lowest overall literacy percentage was found in Bihar (50.4%).
6. Multidimensional Poverty Index (2021)- Similar to HDI, it is also a composite measurement of key dimensions like Nutrition, Child and Adolescent Mortality, Maternal Health, Years of Schooling, School Attendance, Cooking fuel, Sanitation, drinking water, electricity, housing, assets, and bank accounts. Bihar (0.265) has recorded the highest MPI among the states and Dadra and Nagar Haveli (0.122) among the UTs.
7. Net State Domestic Product (NSDP) at current price (2018-19)-The average income of the population in a state is represented by the NSDP at constant price.

The greatest NSDP among the states and UTs is held by Delhi (665808), followed by Maharashtra (2264092).

8. Percentage Workers in Agricultural Sector (2011)- Although agriculture is the nation's primary sector, its gross value added is just 14.65%, compared to 30.19% and 55.17% in the industrial and service sectors, respectively (MOSPI). As a result, workers in the agricultural industry (Census, 2011) typically earn low incomes, which constrains overall economic development. The majority of workers employed in the agriculture sector are in Bihar (70%) in India.
9. Percentage of Workers in Non-Agricultural Sector (2011)- According to the 2011 Census, the majority of the UTs and states in southern India have considerably greater percentages of workers employed in non-agricultural industries. The two states with the highest percentages were Karnataka (91.7%) and Delhi (98.6%), respectively. To comprehend the impact of the development indicators on out-migration from West Bengal, the current analysis considers two outcome variables. The out-migration rate is the first variable, while the proportion of migrants leaving West Bengal for economic reasons is the second. The result of the Karl Pearson correlation analysis has been presented in Table 1.

The relationship between the rate of out-migration from West Bengal and the development indicators of other states has been studied using the Karl Pearson correlation. Table 1 demonstrates that there is a substantial positive correlation between GSDP (1.000**) and the rate of out-migration from West Bengal, indicating that out-migration from West Bengal will be higher in those states or UTs where the GSDP is high. Similarly, there is a substantial positive relationship between the out-migration rate and the literacy rate (0.693**), the HDI (0.628**), and the population density (0.614**). There is a substantial inverse relationship between the percentage of workers in the agricultural sector (-0.992**), the HDI (-0.877***), and the literacy rate (-0.783***), the out-migration rate. A negative correlation suggests that if development indicators decline, more migrant workers from West Bengal will move to those states. On the other hand, the percentage of out-migrants who left West Bengal for economic reasons is strongly positively correlated with population density (0.376*), HDI (0.556**), and NSDP at current prices (0.120). This suggests that more migrant workers from West Bengal are drawn to states with high development indicator ratings. The percentages of workers employed in non-agricultural sectors (-0.992**) and MPI (-0.627**) significantly correlate negatively with West Bengal's out-migration rate. The negative association shows that fewer migrants will migrate to these areas in search of employment the higher the levels of development indices.

Table 1: Karl Pearson Correlation Matrix of Socio-Economic Variables

	VA	VB	VC	VD	VE	VF	VG	VH	VI	VJ	VK
VA	1										
VB	.766**	1									
VC	0.064	0.132	1								
VD	-.428**	-0.097	.376*	1							
VE	.487**	.752**	-0.047	-0.173	1						
VF	0.190	0.105	-0.022	0.031	0.080	1					
VG	-.334*	-0.005	.308*	.628**	-0.005	-.293*	1				
VH	.496**	0.116	-0.264	-.877**	0.087	0.056	-.783**	1			
VI	.488**	.747**	-0.050	-0.176	1.000**	0.080	-0.007	0.090	1		
VJ	0.210	0.060	-.571**	-.559**	0.121	0.081	-.712**	.640**	0.120	1	
VK	-0.179	-0.030	.614**	.556**	-0.093	-0.069	.693**	-.627**	-0.092	-.992**	1

* $P < 0.05$, ** $P < 0.01$, *** $P < 0.001$

VA= Total Out-migration Rate (2011) to West Bengal from other states, VB= Total Inter-State Out-Migration Rate (2011) to West Bengal due to Economic Reasons, VC= Population Density in sq. Km (2011), VD= HDI (2021) by UNDP Method, VE= GSDP in Indian Rupees (Lakh) (2019-20), VF= Unemployment Rate (CMIE Data) (Sep, 2022), VG= Literacy Rate(%) (2011), VH= Multidimensional Poverty Index, VI=Net State Domestic Product at Current Prices (2018-19), VJ= % Workers in Agricultural Sector (2011) and VK=% Workers in Non-Agricultural Sector (2011)

A number of experiences of migrant workers have been discussed in this section. From these, we selected a number of keywords (Table 2) and from which, keyword analysis was conducted (Figure 7).

1. Mohammad Alauddin is cramped in a 150 square foot room with 12 other migrant workers and is unable to move around much. Alauddin, a resident of West Bengal's Malda area, returned from Bihar last week. He had been working there. He thought it would be best to return home once the 21-day lockdown was declared. Alauddin and the others were placed under a two-week quarantine after arriving in West Bengal. Only after the quarantine period is finished will they be permitted to return home. Nearly 125 persons are involved in the group. They are all migrant workers returning to their home states, some of them with families. "There are 125 people living at the school, and there is not much room for us all to move around in. Due to a lack of room, safety precautions including social distancing are not being upheld. The entire goal of keeping us here in quarantine has been defeated" claims Alauddin (Loiwal, 2020). Another migrant worker at this school, Mohammad Rizwan, claims that the designated quarantine facility actually poses a greater health risk. "We were in a relatively safer situation in Patna because we had all the protection we needed. There are 125 of us present. Neither gloves nor adequate masks are present. We have to divide up the four bathrooms. The disease will spread faster in this situation." according to Rizawan (Loiwal, 2020).

2. Another migrant worker at this school, Mohammad Rizwan, claims that the designated quarantine facility actually poses a greater health risk. "We were in a relatively safer situation in Patna because we had all the protection we needed. There are 125 of us present. Neither gloves nor adequate masks are present. We have to divide up the four bathrooms. The disease will spread faster in this situation." according to Rizawan (Loiwal, 2020).
3. Twelve years ago, Rafizul visited Mumbai for the first time. He was now employed as a labour contractor. He now hires people from his village based on need. To conserve money and send the majority of their earnings back to their home, they stayed together in a labour colony. At the end of May 2020, Rafizul was able to go home. Rafizul claimed, "It was July. Our tolerance levels were pushed when 50 people shared that area day and night. The West Bengal government only provided us with a train from Maharashtra" (Bhattacharya, 2024).
4. Akhtar Hossain, 38, left his home in the Haldibari neighbourhood of the district with his wife and three children when the second wave of the epidemic began ravaging Delhi. "I am employed with a steel mill in the Rithala neighbourhood of Delhi. I spent 53 days in lockdown last year. I called the heads of numerous political parties and filled out a lot of paperwork. Nobody came to my aid. Finally, I took a truck back to my house. I was there in a very helpless situation, almost without nourishment. I was unable to take any chances this year (Mitra, 2021).
5. Amalesh Bhuiyan, 21-When Amalesh was 18 years old, he moved to another state for the first time to work. He worked as a centering worker for a private enterprise prior to the lockdown. The contractor used to collect a fee of 20-25 percent of the salary in addition to the daily wage of 350 rupees. The lodging was provided free of cost. Amalesh resided in a so-called labour "colony" at the construction site that was actually just rows of tin shelters with uneven brick floors. For sleeping, the labourers spread out papers, sacks, or bedsheets on the ground. Amalesh left Telangana for home on March 21. On March 23, after an arduous journey, he arrived at his home. The train terminal was crowded. Despite having purchased a general compartment ticket, he was unable to board the train. He then entered a reserved (sleeper) compartment, which was less crowded but still full. For that, the TT penalised him Rs 100. He carried luggage to Kharagpur while standing on one leg. Although the contractor handed him 1,000 rupees for the travel expenses and other travel costs, he did not get his pay for the month of March (Bhattacharya, 2024).
6. On June 9, Ashok Mondal, 27, of South 24 Parganas, arrived at his residence. On June 7, he boarded the Shramik Special. His name was on file with the local police authorities, which gave these employees the paperwork they needed to use the train. Ashok brought snacks and biscuits for consumption on the train but was unable to do so because there was a lack of water to drink (Bhattacharya, 2024).
7. Sekh Nazbul Hassan, 30, Howrah- On June 13, Nazbul boarded a train, but it wasn't

a Shramik Special. Twenty pairs of special trains started operating in May, and it's possible that more have since June 1st. Through a third party, he learned that train services had resumed despite the lockdown. The cost of the ticket was 725 rupees, as opposed to 453 rupees for the equivalent ticket for the general compartment. Nazbul boarded the train with another 34 people. The train was completely full. They managed to locate a spot to stand (Mitra, 2021).

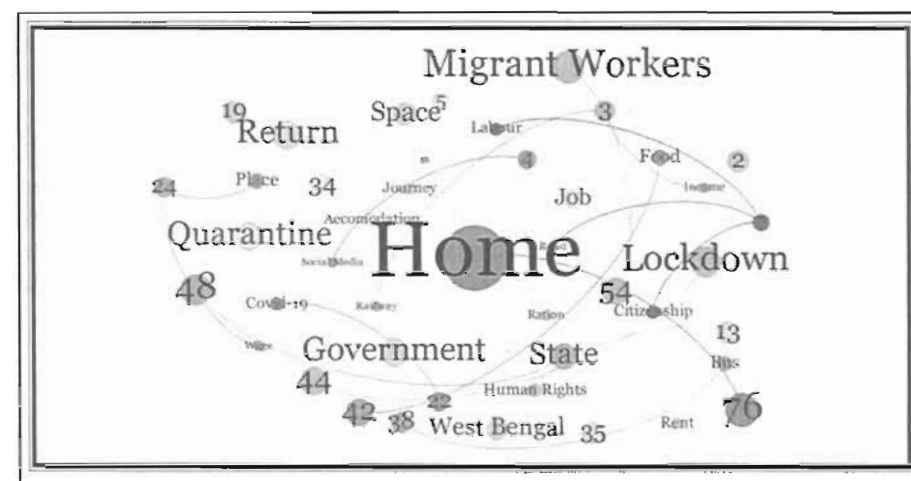
In total, we gathered 47 lived experiences of migrant workers of West Bengal of returning home from their destination states. Some of them can be illustrated. From that we gathered some main keywords which repeatedly appear, from this frequency of keywords can be found which is in Table 2. From this a keyword Analysis was conducted.

Table 2: Keyword Analysis of the Experience of Returning Home of Migrant Workers of West Bengal during Covid-19 Pandemic

Serial No.	Keywords	Frequency
1	State	48
2	Lockdown	44
3	Wage	24
4	Accommodation	2
5	Migrant Workers	54
6	Home	76
7	Food	42
8	Space	19
9	Journey	5
10	Labour	7
11	Rent	28
12	Government	19
13	West Bengal	13
14	Return	35
15	Job	34
16	Railway	3
17	Bus	38
18	Road	7
19	Place	24
20	Ration	5
21	Social media	4
22	Income	3
23	Quarantine	34
24	Human Rights	2
25	Citizenship	7
26	Covid-19	22

The Gephi software has been used for mapping the keywords. Keywords are arranged according to their frequencies. A total of 47 migrant worker experiences has been analysed and we have found approximately 26 keywords to represent those lived experiences. We have analysed and studied these keywords and the findings have been presented in the Figure 7. The 26 keywords have been mapped according to their number of occurrences in the figure. From the above Figure 7 it is clear that the most frequent keyword identified from these experiences is 'Home' followed by 'migrant workers', 'State', 'Lockdown', 'Food' among others. It is also notable that there are very few keywords in the facets of Human Rights. This keyword analysis reveals the levels of spatial experience of migrant workers.

Figure 7: Keyword Analysis of the Experience of Returning Home of Migrant Workers of West Bengal during Covid-19 Pandemic



Approach of the State towards Mitigates Crisis of Returned Migrant Workers.

Short term Measures

Initiatives of West Bengal Government

1. Approximately 2 lakh pieces of personal protective equipment, 2 lakh masks, 10,000 thermal guns, and 300 hospital ventilators have been ordered thus far from a Rs 200 crore fund established for COVID management. Hospital employees, including physicians and nurses, would receive a Rs. 5 lakh insurance policy (Correspondent, 2020).
2. "Prochesta" as a COVID relief package for informal sector workers, wherein workers who are enrolled under the State Sponsored Provident Fund scheme (SASPFUW) will receive a one-time payment of Rs. 1000 (Express News Service, 2020).
3. The West Bengal government devised a number of measures to stop the migration flow of migrant workers, including ordering district administrations

to set up temporary housing and food supplies and requiring all employers to pay their employees their full wages on the due date regardless of whether their establishments are closed during the lockdown period to fight the coronavirus infection (S. S. Singh, 2025).

4. Insurance coverage for all individuals assisting in this health crisis has been enhanced from Rs 5 lakh to Rs 10 lakh, including employees at private, government, and transit centres, including doctors, nurses, police, and support service personnel (Singhal, 2026).
5. The cost of migrant workers returning to the State via Shramik special trains will be covered entirely by the West Bengal government (Chattopadhyay, 2020).

A Universalized Food Distribution System

Since there is no comprehensive record of internal migrants, and not all migrants possess a valid form of identity or are enrolled under a particular programme, it is difficult to provide resources to the targeted population, as was already indicated. Ration cards are not intended to be transferable between states. In this situation, the central government can provide food to people who are still stranded in urban areas, such as food grains, pulses, and other essential commodities, until the lockdown is entirely lifted and the workers are able to resume their jobs. By self-attesting and self-identifying, anyone can use the scheme, regardless of their domicile-based identity.

Financial Support

Under the Pradhan Mantri Jan Dhan Yojana, individuals who are still stranded in urban areas and have bank accounts may receive minimum wage transfers for the subsequent three months. It would help migrant workers meet their basic needs. Additionally, those who have returned to their homes but are unemployed may receive their pay under the Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGA).

Continuation of Shelters in the City

Since individuals without employment or money cannot continue residing in rental housing, it is important to keep the public shelters open that provide employees with hot meals and a place to sleep. They would be unable to prepare food adequately as a result.

Long Term Solution

Registration of the Migrant Workers

Whether they are migrating independently or with a contractor, migrant workers must be registered as soon as they arrive in a new state and given the Universally Valid Shramik Card/Number. The introduction of the card will make it easier for migrant workers to receive federal benefits and will help the federal and state governments keep track of the number of migrant workers entering each state.

Eradicating the Duality and Segregation of the Labour Market

The Government should progressively do away with the distinction between the formal and informal sectors. Unorganised sector employees are typically more vulnerable to exploitation. Therefore, a united employment market must be promoted in the long run. A direct connection between the employer and the employee is also preferred above anycontractual intermediaries. The role of middlemen in industries where they are required must be carefully scrutinised by the relevant authorities.

Incorporating the Migrant Workers into Mainstream.

Giving migrant workers social, legal, and occupational security as well as including them as beneficiaries in the healthcare system can accomplish this. To do this, though, you must properly register and get a registration number or card that is recognised across states. Last but not least, the government can help small enterprises, especially in rural areas, by providing funding, which will increase employment opportunities for locals and keep people from feeling compelled to migrate to urban areas for employment. Even though widely recognised, this strategy is too important to overlook.

Conclusion

The target states serve as a preferred location for migrant workers. However, destination states and the experiences they offer are so economically attractive to migrant labourers for a number of reasons, including better livelihood, free food and accommodation, and improved salaries. This study investigated the meanings and experiences that migrant workers ascribed to their travels to different states in light of this. The theoretical goal is to support the assertion that, despite widespread notions to the contrary, destination states and the experiences that they offer matter increasingly to those who migrate to them. According to this study, the COVID-19 Pandemic serves as a structural catalyst for the present dynamics that contribute to a feeling of Placelessness. These destination states might be thought of as a compromise between the factors that give locations a sense of Placelessness and the factors that increase their allure. Therefore, rather than dismissing Placelessness as being acceptable, the current study affirms that experiencing Placelessness is symbiotic with experiencing place. This study emphasises that space is a product of human volition and a setting for social and cultural transformation. As there are so many different social spheres in the modern metropolis, the forces of globalisation have caused social realms that were once distinct to merge.

A range of migrant labourers must be incorporated into policy framework in order to create and promote industrialisation and employment opportunities. Therefore, the placeness of migration destinations should take into account all aspects of work prospects and better salaries, whether they are rooted in place or changed by outside dynamics. Destination States serve as example of how to create modern employability, which differs from the objective employability of a space and has wide appeal to migratory workers from many states.

Second, the most sought-after locations for employment create their own distinctive environments and facilities. Destination States like Delhi, Maharashtra, and Gujarat cater to labourers seeking higher wages for the same job than they can find in their home states. This phenomenon is not entirely consistent with Relph's concept of Placelessness because the border between authenticity and inauthenticity, or between location and Placelessness, has become increasingly blurred, if not totally collapsed, in the age of simulation. The research on migrant workers' experiences in the modern labour market should embrace the idea that metropolitan settings are commodities to be consumed through expanded economic opportunities rather than strictly adhering to the idea of authenticity. Sometimes, a person's perspective of a place develops from their family members and neighbors, who are more influential than the well-known location due to its work opportunities, openness, greater scope, or unique heritage, values, and traditions.

Finally, the present study contains a number of shortcomings. The fact that the current study only focuses on industrialised metropolitan areas as a final destination means that it is limited in its ability to thoroughly explore the various facets of the phenomena of labour migration in other nations, particularly in those in Europe. It is also said that the study's primary focus was the situation of migrant workers during the pandemic breakout. As a result, it has prompted more in-depth inquiry about the lives of migrant workers and their experiences in the post-pandemic period. Another limitation is the inherent subjectivity of the phenomenological analysis of the interview data, which is necessarily impacted by the socio-demographic status, philosophical beliefs, and cultural background of the author. In a populous nation like India, the current study aimed to identify the dimensions of the phenomenon of labour migration. As a result, more empirical research on migration using quantitative and interpretive methods is required to address the many unresolved issues surrounding the phenomenon of labour movement in India and other South Asian countries.

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Jayatree Buragohain and Meenu Anand

Inclusion of Gender-Diverse Students in Higher Education: Institutional Preparedness and Policy-Practice Gaps in Kerala

Neenu Mathews

Rethinking the Notion of 'Place and Placelessness' in the Experience of Migrant Workers in West Bengal During Covid-19 Pandemic

Soumyajit Halder and Aritra Chakraborty