

From Varna to Caste: Historical Genealogy, Coloniality, and the Politics of Social Classification in India

Dr. Neha Singh

Department of Political Science, Ramanujan College, University of Delhi

Abstract

The relationship between *varna* and caste has remained a central subject of debate within scholarship on Indian society, social stratification, and religious traditions. Much of the contemporary discourse frequently treats caste and *varna* as interchangeable categories, thereby presenting the caste system as a direct extension of Vedic social philosophy. This paper is an extract of a research project titled “Understanding the Discourse of Caste and Race in the Contemporary World (F. No. ICSSR/RPD/MJ/2023-24/G/42)” funded by Indian Council of Social Science Research (ICSSR), which critically interrogates above conflation through a historical and genealogical analysis of the evolution of social classification in India. Drawing upon Vedic texts, colonial ethnography, historical accounts, and modern scholarship, the study argues that *varna* and caste constitute analytically distinct categories despite their historical intersections. While *varna* emerged within a broader philosophical and ethical framework grounded in *guna* (qualities), *karma* (actions), and social obligations, caste gradually evolved as a more rigid system marked by hereditary distinctions, social closure, and exclusionary practices. The paper further examines the role of colonial interventions in transforming fluid social distinctions into codified and administratively fixed identities through census enumeration, racial theorisation, and political categorisation. By tracing the historical trajectory from Vedic social organisation to contemporary caste configurations, the study seeks to contribute to broader debates on caste, coloniality, and the social construction of identities in India.

Keywords: Caste, Varna, genealogy, coloniality, social classification, Vedic philosophy, social stratification, India.

Introduction

The question of caste occupies a central place in the study of Indian society and continues to generate extensive debates across sociology, political science, anthropology, history, and religious studies. The persistence of caste-based inequalities, discrimination, and social exclusion has made caste one of the most significant analytical categories through which Indian social structures are understood. However, despite the abundance of scholarship on caste, considerable ambiguity persists regarding its conceptual origins, historical development, and relationship with the Vedic notion of *varna*. A recurrent tendency within both academic and public discourse has been to collapse caste and *varna* into a singular category, often treating the former as a

direct continuation of the latter. Such a perspective assumes an uninterrupted historical continuity between the Vedic social order and contemporary caste practices.

The tendency to equate caste with *varna* has acquired additional significance within modern political and international discourses concerning discrimination and social justice. Colonial ethnographic practices, racial interpretations, and administrative classifications contributed substantially to the institutionalisation of caste categories and to the representation of caste as an immutable social order deeply rooted in Hindu religious philosophy. Simultaneously, certain anti-caste narratives have similarly understood caste as inseparable from Hinduism itself. While such perspectives have played an important role in exposing systems of oppression and exclusion, they frequently overlook the historical processes through which social categories underwent transformation and acquired new meanings.

This paper seeks to critically examine the relationship between caste and *varna* by adopting a genealogical approach to the study of social classification in India. It argues that caste and *varna* are analytically distinct concepts and that the contemporary caste system cannot be understood merely as an unaltered continuation of Vedic social philosophy. Instead, caste is approached as a historically contingent institution shaped by complex interactions among philosophical ideas, social practices, political developments, and colonial interventions. The paper first examines competing understandings of caste and *varna*, followed by an exploration of their historical trajectories and conceptual distinctions. It then investigates the role of colonial modernity in the codification and politicisation of caste identities and concludes by identifying the variables that contributed to the transformation of social organisation in India.

Colonial Time

Caste, being an aberrative internal contradiction of the Indian society, has invariably ailed the ontology of an antiquated civilisation, that of South Asia. This is a civilisation that, accompanied by a corresponding transcendental metaphysics made intelligible to the mortals as the Vedic philosophy, sought a harmony between and unison of varied peculiarities and distinctness that kernels different cosmos, energies, beings, and species. The caste system, since it has disparaged this unison, must be mercilessly eradicated. In this, we affirm the project of caste annihilation as patronised and advocated vigorously by the architect of the Indian Constitution and the Dalit warrior, Dr. Bhimrao Ambedkar. However, we depart here as we do not affirm Ambedkar's insistence that Hindus are casteist merely because they are religious, and neither do we agree with his solution of destroying the religion of Hinduism in order to wipe out the caste system, 'caste may be bad. Caste may lead to conduct so gross as to be called man's inhumanity to man. All the same, it must be recognized that the Hindus observe Caste not because they are inhuman or wrong-headed. They observe Caste because they are deeply religious. People are not wrong in observing Caste. In my view, what is wrong is their religion, which has inculcated this notion of Caste' (Ambedkar, 1979, p. 68). We believe that such a radical resolution to the caste predicament suggested by Ambedkar unfortunately results from a misplaced understanding on part of Ambedkar, and by extension, most Dalits activists working at the national and international level, to associate caste with the Hindu philosophy. Such an understanding of caste as inherently premised on Hindu religion is vehemently Eurocentric and has hijacked the contemporary definition of the category, such as one provided by J. H. Hutton in 'Caste in India: Its Nature, Function, and Origins' (1963), 'caste is a collection of families or groups of families bearing a common name; claiming a common descent

from a mythical ancestor, human or divine; professing to follow the same hereditary calling; and regarded by those who are competent to give an opinion as forming a single homogenous community' (p.47). The commonplace acceptance of the such Eurocentric understanding of caste has been a consequence, in our understanding, of two particular predilections on part of the stakeholders which has disastrously led astray the anti-caste and anti-discrimination movement in the contemporary era: 1) the stakeholders have not made themselves privy to the nuanced understanding of the system of varna as elucidated in Vedic texts, either out of sheer ignorance and indolence or due to an wilful omission as non-recognition of the ecclesiastical origin of varna, as contrast to caste, aids them to bind caste and Hinduism in a much more insidious manner; 2) against the backdrop of such an ignorant attitude with regards to the genesis of varna, these stakeholders have undertaken a direct translation of varna into contemporary caste, using them interchangeably and casting them in the same mould of discriminatory system, and in the process, rendering invisible all those crucial changes and developments that had transpired between the godly origins of varna and the mundane origins of caste, and their corresponding historical eras of Vedic period and contemporary society. It is at this juncture that we can locate the problematic of this chapter: to understand the ignominies of the caste system and its variables, as distinct from the varna concept. To this end, we begin with differentiating caste from varna. Intrinsic to this differentiation is to chart the trajectory of the system of societal classification as it traversed from the Vedic age—where the classificatory system manifested as the divinely ordained varna—to the more contemporary period where a fundamentally different system of social classification prevails, one that shares no parallels with the philosophy of varna. The chapter then proceeds to demonstrate how the caste-based vices that actualised themselves only sporadically were harnessed and politicised by the British through four means: the ethnographical project of enumeration materialising in the census, the racial project of drawing caste-race comparability, the moral project of (ostensible) benevolence observed in its self-proclaimed role as a crusader of oppressed minorities, and the political project of divide-and-rule. This is followed in the succeeding section by an attempt to discern certain variables of the caste system.

Interchangeabilities and Synonymities

Comprehending caste is a behemoth task in itself, especially when a well-structured definition that commands universal acceptance is observably lacking. While British colonial accounts, particularly those authored by ethnographers and administrators such as H. H. Risley, harp on the racial understanding of the caste groups based on anthropometric principles and the associated theory of race-encounter, G. S. Ghurye understands it as 'a Brahminic child of Indo-Aryan culture cradled in the land of the Ganges and thence transferred to other parts of India' (Ghurye, 1932, p.143). Thus, Ghurye, while vociferously thwarted colonial attempts to politicise caste through enumeration and introduction of caste-based separate electorates, he seems to concede to the racial theory of caste genesis so infamously propounded by colonial administrators. As per the racial theory of caste, the Indo-Aryans arrived at the Gangetic plain with their loosely endogamous three-fold social classification accompanied by a certain sense of their importance and a spirit of exclusiveness born of such an attitude' (Ghurye, 1932, p. 143). The caste system was born out of the attempt on part of these Indo-Aryans to maintain their purity at the expense of excluding the aborigines of the region from the religion of the Indo-Aryans. These excluded and polluted aborigines came to be known as the Shudras. Apart from the false project of divine hermeneutics that witnessed these anglicised scholars interpreting the sacred texts and epics of the antiquated civilisation of India ostensibly under the pretext of 'apolitical and anthropological

knowledge-creation' an auxiliary project was also aimed at legitimising the theory of Aryan invasion that sanctifies the presence of caste system as an institution that has naturally evolved among the people of the subcontinent, which in turn absolves the colonisers from all blames of having reified the caste system. India and its people posed a problem for the colonisers who faced dilemma as how to the division of the colonised mass based on the colour binary of Whites and Blacks, the population was characterised by different shades of black and white with colour note determining one's socio-economic status. Affirming the theory of Aryan invasion, Muller states that 'the Aryans, who came to India from the north, vanquished the Indian population and settled in the Subcontinent, declined gradually as a result of racial contamination and the effects of the tropical climate' (Baijayanti, 2016, p.218). In 'On the Relation of the Bengali to the Arian and Aboriginal Languages of India', Muller writes, 'When the Arian tribes immigrated into the north of India, they came as a warrior-like people, vanquishing, destroying and subjecting the savage and despised inhabitants of those countries. We generally find that it is the fate of the negro race, when brought into hostile contact with the Japhetic race, to be either destroyed and annihilated, or to fall into a state of slavery and degradation, from which, if at all, it recovers by the slow process of assimilation. This has been the case in the north of India' (1848, p.348). Given this, Swami Vivekananda was absolutely right in stating that the colonisers pioneered the project of demonising the Hindu Dharma and of ridiculing our existential and spiritual values, customs, beliefs and practices under the supposedly regressive rhetoric of backward looking ritualism, idol worship, and superstition, and casteism.

Yet for some others, caste is nothing but an indigenous system of class distinctions, emphasising that caste and class are merely different forms of status groups as espoused in the Weberian framework. Following suit, Ambedkar explains the caste system as initially comprising of classes—Brahmins (the priestly class), Kshatriya (the military class), Vaishya (the merchant class), and Shudra (the artisan and menial class). Over time, the priestly class 'socially detached itself from the rest of the body of people and through a closed door policy became a Caste by itself' (Ambedkar, 2004, p. 147). On the other hand, other agents, especially those situated at the crest of global Dalit activism, establishing international lobbies and mobilising foreign aid in India's domestic fight against casteism, define caste as an Indian system of racial segregation. Thus, the caste system is imbued with complexities and intricacies that elude a specific definition of the system. Notwithstanding its multifaceted nature, one thing is certain: caste is and must always be alienated from the Vedic germination of the varna system or varnashrama. This alienation must be repeatedly stressed as popular understanding collapses caste and varna together. Even the Vedic scholars in the medieval period attempted to define the caste system with reference to varna, but they failed in this attempt to coalesce caste and varna. Noting this, Dr. Ajay Mitra Shastri remarks, '...as various occupations became hereditary, they formed the castes. To adjust the various castes in Varna system, Smriti's considered Anuloma (marriage of lower Varna woman with high Varna man) and Pratiloma (marriage of high Varna woman with lower Varna man) marriages being responsible for emergence of the various castes. However, the attempt seems to have failed as people mentioned their own professional castes in various donations inscriptions' ((Itihās: Prachin Kal (Vol. 1), Maharashtra State Gazetteer, p. 489). Also, it is no help that even a simple web search of the meaning of the terms varna or varnashrama situate them in close alliance with the caste system. For instance, the Merriam-Webster Dictionary blatantly translates varnashrama as the 'institution of caste'.

All these attempts at defining caste by contemplating its genesis are corrupted as they are charged with foundationalism. Meaning that their explanations of the origins of castes to arrive at a definite definition of the system take as givens the four-fold classification of society into groups of Brahmins, Kshatriyas, Vaishyas, and Shudras. The existence of these groups is treated as a priori and pre-discursive and having assumed so, they proceed to simply explain how these groups got transformed into castes. In the process, they fail to explain the genesis of those very groups, which is contained in the texts of the Vedic age. Of course, what the Vedic texts talk about are the varnas, not caste per se, as today's caste system is a highly distorted manifestation of the divine order of varna. So, in order to understand the present caste system, it is essential to travel back in time and get familiarise with the birth of varna. But this task entails a repeated reminder that caste differs from varna and that caste, as we know it today, does not enjoy the divine sanction of the Vedas. As Ambedkar had repeatedly stressed, 'Varna and Caste are significantly two different conception- Varna is based on the principle of each according to his 'worth' while Caste is based on the principle of each according to his 'birth'. The two are as distinct as Chalk is from cheese. In fact, there is antithesis between the two' (BAWS, Vol. 1, 1979, p. 93). This antithesis becomes starkly clear with Shri Aurobindo emphasising on how caste rigidity is an unHindu spirit, 'The baser ideas underlying the degenerate perversions of the original caste system, the mental attitude which bases them on a false foundation of caste, pride and ignorance, of a divinely ordained superiority depending on the accident of birth, of a fixed and intolerant inequality, are inconsistent with the supreme teaching, the basic spirit of Hinduism which sees the one invariable and indivisible Divinity in every individual being'. Of course, a certain historical analogy—and not ideological—can be drawn between caste and varna, if we must, because, as one may argue, caste, being a distorted version of varna is itself an indication of its association, albeit a distorted one, with the Vedas. While this may be true, the erstwhile divinely sanctioned social order has been incessantly subjected to uncountable disturbances, developments, and historical changes that the end product, which is the present-day caste system, has taken shape in a manner that repudiates all that had been affirmed by the Vedas. To put simple terms, the present caste system has historically evolved antithetically and as anathematic to the Vedas Thus, before we delve into the genealogical investigation of varna, a note of caution is important: varna and caste are inherently different from each other. So that the caste-varna differences are not obliterated and glossed over, let us quickly elucidate them before undertaking a genealogical analysis.

The prevailing international clamour on caste orchestrated by Isabel Wilkerson's 'Caste', the Cisco Case, and the Seattle City Council, and several other developments in the domestic politics of the Global North, has consistently coerced caste into the socio-cultural and religious fabric of India and Hinduism. We counter against such an outlook as we understand caste as a creation of the modernity-colonialism matrix, and hence having no relation to the Indian culture and the faith, religion, and liturgies of Hinduism. What finds mentioned in the Vedas and Hindu philosophy is varna, in strict contradistinction to caste whose codification and formation were undertaken not at the behest of the Vedas. First of all, the etymology of the word 'caste' reveals its foreign origin as it is derived from the Portuguese term 'casta', 'The modern conception of 'Caste' is a European invention as the word "caste" was invented by Portuguese seafarers who traded mainly on the west coast of India in the 16th and 17th centuries. It was taken from the Portuguese word "casta" meaning "species" or "breeds" of animals or plants and "tribes," "races," "clans," or "lineages" among men' (Quigley, 1993, p.4). Apart from this, while caste and varna may seem to share structural features of endogamy,

occupational restrictions, and precedence of ascriptive traits, the varnas are by and large text-based and their existence does not reflect in real empirical reality, at least not in our current lived reality of Kali-yuga, abundantly testified by the fact that ‘no society across the Indian subcontinent is actually divided into merely four groups of brahmin, kshatriya, vaishya and shudra’ (Samarendra, 2011, p. 52). Further, considerations of social solidarity undergirding the interdependence between ‘different’ units played a major role in the metaphysical arrangement of the mortal world into four-fold varna. Difference and differentiation, as long as they do not degenerate into violence, are good and necessary as they ‘generate[s] innovation and productivity’, Vivekananda opines. Such varna-based differentiation, unfortunately, transgressed into privileges and elite exclusivity, materialising into caste-based inequalities as our society traversed the trajectories of human history and as the juridical state of nature allowed men to hail their vices of hierarchy, a hierarchy which was eventually institutionalised and politicised by the British. As such the earlier notions of embeddedness, accord, and harmony underpinning the necessary and natural differences among men and as envisaged in the varna system are found to be utterly lacking in the caste-society that ‘presented the spectacle of self-centred groups more or less in conflict with one another’ (Ghurye, 1932, p. 303). Vocalising such a concern, M. K. Gandhi laments that ‘caste as it exists today is a travesty of the original fourfold division which only defined men's different callings’ and that it is ‘in a crucible today’ (2004, p. 57, 56). This is what has been reiterated by Dr. Sanjay Vishnu Tambat (2020), in the webinar ‘Black Lives Matter’: Indian Perspectives’, organised by Social Studies Foundation (SSF), in partnership with News Bharati, who harped on the ‘high philosophic principles’ of our indigenous faith from which we have unfortunately digressed.

Conclusion

This study demonstrates that the relationship between *varna* and caste cannot be understood through assumptions of direct continuity or conceptual equivalence. The genealogical analysis suggests that while *varna* emerged within a broader philosophical and ethical framework based upon social functions, duties, and individual qualities, the contemporary caste system evolved through a long and complex process of historical transformation. Social practices, political developments, changing institutional arrangements, and colonial interventions contributed significantly to the restructuring and codification of social identities. The paper argues that colonial mechanisms such as ethnographic enumeration, racial classification, and administrative categorisation played a decisive role in reifying social distinctions into more rigid and hierarchical forms. Recognising the distinction between philosophical categories and historically constructed institutions is crucial for a nuanced understanding of caste and its contemporary manifestations. Such a distinction not only enriches debates on social stratification in India but also provides a more historically grounded framework for examining the persistence and transformation of inequality.

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