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Abstract

Even though management research on caste is growing, it is not yet on a clear trajectory to realize its vast potential due to varying terminology and framing of caste, the limited incorporation of directly relevant work from proximate disciplines, and the narrow and selective usage of the attributes of caste. To remove these obstacles, we review 259 scholarly works on caste (216 articles and 43 books and research reports) and develop an integrative framework to i) clarify the contemporary manifestations of caste as being *a graded hierarchy*, *an inherited membership*, and *a set of socially enforced practices*, and ii) summarize the outcomes of caste at individual, occupational, organizational, and societal levels, while also consolidating the mechanisms through which caste influences these outcomes. Additionally, to position management scholarship on this topic for greater impact, we develop a research agenda that reflects contemporary interests in management and the world at large about inclusion in organizations and societies. The caste system has practical significance for a large portion of the global population.

Within South Asia, caste disadvantages those who are at the bottom of the caste system or have no position at all in that system (i.e., nearly 300 million "untouchables" and over 100 million Indigenous peoples) and shapes the socioeconomic lives of nearly two billion people by influencing their possession of and access to resources and opportunities (Alamgir et al., 2022; Bapuji & Chrispal, 2020). Globally, caste affects the South Asian diaspora that is spread around the world due to colonization and economic migration (Yengde, 2022). As a result, there is growing recognition of the ways in which caste affects organizations and value chains, accompanied by the emergence of attempts in organizations to address these (Bapuji et al., 2023).

As a social construct, caste has theoretical significance for many management topics, as well as for an understanding of systems of inequality more generally. Caste plays a role in a broad range of topics that management scholars study, such as CEO hiring (Damaraju & Makhija, 2018), board diversity (Bhattacharya et al., 2022; Garg et al., 2023), social networks and partnerships (Bhardwaj et al., 2021; Bhattacharya & Dugar, 2014; Vissa, 2011), venture capital funding (Claes & Vissa, 2020), microfinance (Patel et al., 2022; Meshram & Venkatraman, 2022), entrepreneurship (Audretsch et al., 2013; Iyer et al., 2013), family business (Mani & Durand, 2019), identity management (Shepherd et al., 2021), and knowledge transfer (Qureshi et al., 2018). Further, caste is increasingly used as a lens to understand systemic inequalities around the world (Bapuji & Chrispal, 2020; Bhatt et al., 2022; Mair, et al., 2016; Piketty, 2020; Soundararajan et al., 2023; Wilkerson, 2020) as well as organizational structures and practices that relate to inequality (Ray, 2019).

Perhaps as part of a late-arriving, but needed, recognition of the theoretical and practical significance of caste, management scholars have recently directed greater attention to it. This growing interest in studying caste is in line with recent calls for research that can improve the lives of a vast number of people (Tihanyi, 2020) and have a positive impact on society (Wickert

et al., 2021) by contributing to sustainable development goals (Chrispal et al., 2021; Mosse, 2018). Therefore, to set management research on caste on a trajectory for greater theoretical and practical impact, we review this research to answer the question: *What are the implications of caste to management research and practice?*

Our review is aimed at helping management scholars understand the implications of caste that are most relevant in contemporary organizational contexts. Therefore, we will not provide a description of the caste system, which can be found in other studies (e.g., Hoff, 2016; Olcott, 1944; Ghurye, 1969). We will also not discuss the genesis or the original intent of the caste system, which have been debated extensively (e.g., Ambedkar, 1989; Dirks, 2001; Dumont, 1980; Raheja, 1988; Vaid, 2014).

The remainder of this review is organized as follows. First, we summarize our review procedure and present a set of overarching observations about the state of research on caste. Second, we clarify caste and its manifestations that are relevant in organizational contexts. Third, we provide an integrative review of the research on caste across different topics and streams of research, summarizing the many ways in which caste influences outcomes at multiple levels, through a range of mechanisms. Finally, we present a broad research agenda to help management research contribute impactfully to the growing discourse on caste.

REVIEW PROCEDURE AND INSIGHTS ON THE STATE OF CASTE RESEARCH

Review Procedure

We followed a multi-step process to identify the relevant scholarly output to review, screen it for inclusion, and analyze its content for this review (*Appendix 1* provides further information). First, we identified a set of 90 terms that represent the caste system, caste groups, and specific castes. Second, we conducted a search using these terms in the *Web of Science*, covering the disciplinary categories of business and management as well as selected proximate disciplines (i.e., economics, sociology, development studies, public administration, and

psychology) in which the scholarship on caste might be directly relevant to management. Third, we read the titles and abstracts of the retrieved 3,411 records and excluded a vast majority of these because, even though they were retrieved due to one of the search terms being matched, these works were not related to caste (e.g., papers that used tribe to refer to Indigenous people from Africa) or they discussed topics that are distant to management (e.g., voting behavior). Fourth, to cast a wider net and reduce the chances of missing relevant studies, we identified additional papers, scholarly books, and research reports through a full-text search in FT-50 journals and a backward citation search of papers that were identified until that stage. Fifth, to ensure that no influential papers were missed, we identified additional works by reviewing the titles and abstracts of the most-cited works on caste, including the disciplinary categories not covered in the second step above. Sixth, two authors examined all the articles that were shortlisted up until that stage and identified works that presented a study of caste in an organizational context (e.g., public, private, and non-governmental organizations) or topics that are commonly studied by management scholars (e.g., hiring discrimination). In the last step, we coded each paper to capture the extent to which it engaged with caste and included only those papers in which the engagement was substantial, excluding papers in which caste was a peripheral concern.

After the above process, we ended up with 216 papers, 31 books, and 12 reports. The 216 papers that we content analyzed using a coding scheme form the primary basis for our review, while the main findings and ideas in the books and reports also inform our analysis.

Overarching Observations

Vibrant research on caste and review articles in proximate disciplines. The caste system has attracted much attention from proximate disciplines, with early works outlining the genesis of the caste system and its mechanisms, and theorizing how new castes arise (Ambedkar, 1989; Macdonell, 1914). These early works covered a range of topics that aimed to understand the

caste system by comparing it with similar systems elsewhere, such as class (Ross, 1917) and race (Berreman, 1960), as well as the intersection of caste and such systems (Warner, 1936). Further, early examinations already documented the wide-ranging economic and social consequences of caste (Altekar, 1929). This broad interest has endured, resulting in substantial research in several disciplines, which has been the subject of at least five reviews (Gupta, 2005; Mosse, 2018; Munshi, 2019; Raheja, 1988; Vaid, 2014).

These five prior reviews differ from our review in the target audience, focus, concerns, and literature covered (*Appendix 2* presents a table that details the differences and summarizes the overall findings of the previous reviews). Two of these reviews (Gupta, 2005; Raheja, 1988) primarily aimed to develop a theoretical understanding of caste. Raheja (1988) argued that social dynamics can be better explained by interpreting caste in relation to the secular sovereignty of the king or dominant caste, rather than viewing caste as a hierarchy based on purity that places Brahmins at the top. Pointing to the need to focus on *jati* as the unit of analysis, Gupta (2005) offered the political mobilization of low castes in India as an illustration of caste identities strengthening even when the conventional hierarchy of *varnas* was weakening.

The other reviews (Mosse, 2018; Munshi, 2019; Vaid, 2014) focused on broader societal, political, and economic implications of the caste system, while also highlighting aspects of caste by considering its changing nature. Discussing the social and occupational mobility of middle and low castes as an indication of caste becoming less rigid generally, Vaid (2014) noted that discrimination limited the occupational mobility of Dalits specifically. Vaid (2014) also emphasized that caste is not limited to South Asia and Hinduism but is also prevalent in other religions and other parts of the world with South Asian diaspora. Outlining the social, economic, and political inequalities along caste lines, Mosse (2018) highlighted that such inequalities occur due to occupational and market rankings along caste lines, network

effects, and categorical exclusion of specific groups. Consequently, he proposed considering caste as a rank, a network process, and an identity. In a parallel vein, Munshi (2019) elucidated the role of caste networks in the development and operation of industrial clusters, along with the presence of discrimination across broader caste categories within the labor market.

As prior reviews of caste illustrate, research in proximate disciplines has often examined caste in economic contexts, generating insights that form an important basis for our review. Indeed, just over half the papers in our review list (118 of 216, or 55%) are from proximate disciplines. Yet, only a small subset of these papers was covered by the five reviews above, which we include in our review owing to our distinct focus on management research and in being able to include the latest scholarship. As such, our review complements and extends these five reviews by (i) clarifying the manifestations of caste that are relevant in organizational contexts and (ii) summarizing the multi-level outcomes of caste and the mechanisms driving those outcomes. Together, these will help management scholars better understand caste, study its implications, and develop interventions to address these implications.

Growing attention and contributions, but limited clarity and narrow focus. With the first paper published in 1921 (in the *Journal of Applied Psychology*, examining racial differences in "the psycho-motor ability" of American, Brahmin, and Dalit children), interest in caste is technically over a hundred years old in management research, but has gained prominence only recently across disciplines. Nearly half (49%) of the papers in our review were published in the last seven years (i.e., 2017-2023). This growing interest is even more evident in management research, with 69% of papers (or 68 of 98 papers) published in management journals appearing in the last seven years.

The 216 papers included in our review come from 114 journals. Focusing on the 98 papers that were published in management journals, a majority (60) of them were from the

journals in the FT-50 list or ranked at the top in the ABS (4*) or ABDC (A*) lists. Notably, two-thirds of these papers (40 out of 60) were published in the last seven years, reflecting recent growth in high-quality research and a growing recognition of caste as an important topic in high-quality management journals.

Of the 216 papers in our review, a large majority (82%) are empirical, within which most (56%) are quantitative. Looking at the trends over time, we see an increase in the prevalence of qualitative papers, which make up 43% of papers published since 2017, compared to 31% in the period before. In that same period, quantitative papers decreased, from constituting 50% of papers published before 2017 to 42% of those published since then.

Researchers have used diverse methodological approaches to study caste. Quantitative methodological approaches include the use of data from general surveys conducted by government and non-governmental agencies (e.g., National Sample Survey Organization, India Human Development Survey; 32 studies out of 99), surveys designed by researchers (21 out of 99, including four in which surveys were supplemented with interviews or experiments), experiments (21 out of 99), and constructing datasets from a variety of archival sources (25 studies out of 99, including six in which interviews or surveys were added). The use of last names to probabilistically identify the caste of an individual has become increasingly sophisticated due to the use of machine learning algorithms (e.g., Bhagavatula, 2023; Vissa, 2011). In conducting experiments, scholars have commonly used last names to invoke caste (without explicitly mentioning caste, which can bias responses). Among qualitative methodological approaches, interviews were the most used (78% or 62 papers, including 19 that used only interviews and 43 that supplemented interviews with other data sources, such as non-participant observations and archival data).

Despite the growing research on caste, there is no clarity on what caste is, particularly in terms of its manifestations and how these take shape in organizational contexts. This is

evidenced by the small percentage of studies (49 empirical papers, 28% of the entire sample) offering a clear and explicit definition of caste. Even when definitions are offered, studies have relied predominantly on aspects of caste that are more, or that are just as, relevant to a broader societal context (e.g., exclusion, social divisions, social practices, Mair et al., 2016) rather than to organizational contexts in particular. This lack of clarity might have also led to – and is reflected in – studies often discussing caste by referencing different constructs, such as social class (Tsui-Auch, 2005), religion (e.g., Audretsch et al., 2013), or community (e.g., Mani, 2021), rather than addressing it directly. This manner of framing caste has implications both for accumulating a cohesive knowledge base on caste (as well as the knowledge about other referenced constructs, on which there is already relative clarity and a substantial body of work). Further, by not naming caste as such and subsuming it under other constructs, some scholars may unwittingly be invisibilizing caste, inflicting epistemic injustice because of the epistemic impunity that caste affords them (Banerjee et al., 2022; Dixit, 2023).

Lack of explicit attention to caste might have been a result of scholars from the middle and low castes being nearly wholly absent in management academia, use of perspectives that attempt to understand caste-related phenomena with the help of constructs from the Western world (e.g., class and race), and due to knowledge taboos (Chrispal et al., 2021). Although caste and class correlate highly in India (Piketty, 2020), the research we reviewed reveals the distinctiveness of caste and shows that its effects are evidenced over and above those of class. A clear majority of the quantitative studies in our review have accounted for class either in their research designs (e.g., by sampling data from a homogenous class, 43 out of 99) or by controlling for it in statistical analysis (e.g., by controlling for income, land ownership or parents' occupation, 37 out of 99). The 99 quantitative studies in our review are set across rural and urban settings (only rural in 22, only urban in 22, both rural and urban in 53, information unclear in 2), revealing that caste influences the socioeconomic lives of people across rural and

urban areas, and that its effects are not confined to the hinterlands and rural villages.

Even though some features of caste are present in multiple countries (e.g., countries within South Asia and in countries with South Asian-origin diaspora) and religions (e.g., Christianity, Hinduism, Islam, and Sikhism) (Bapuji et al., 2023), management research on caste has a relatively narrow focus on India and Hinduism. For example, empirical research on caste has overwhelmingly been conducted only in the Indian context (168 out of 178 empirical papers, 94%). Further, a great majority of empirical papers (170 out of 178 papers, 96%) describe caste by commonly tying it to Hinduism, i.e., the discussion of caste is based on the features and caste names that are associated with Hinduism. Of these 170 papers, 26 also discuss caste in the context of other religions, i.e., in addition to Hinduism. Due to these broader patterns in the literature, i.e., of not acknowledging caste in other religions in a broader manner, studies have sometimes not considered the possible manifestations of caste in these religions (e.g., Damaraju & Makhija, 2018) or have grouped all of these different religions as "others" (e.g., Chen et al., 2015), which provides empirical inferences that are not necessarily representative of the full range of the influence of caste.

As another reflection of lack of clarity, scholars have used a range of terms to describe caste groups and castes, which can be daunting to those who may be unfamiliar with the caste system. In *Appendix* 3, we provide a brief description of the various terms used in research to provide an entry point for interested scholars.

Given the plethora of caste-related terms and their varied (and often contested) use, it is necessary to clarify our use of these terms in this paper. We use high, middle, and low to refer to the position of castes in the hierarchy. Specifically, we use high to refer to Brahmins, Kshatriyas and Vysyas as well as those categorized as General or Forward castes, middle to refer to Shudras and Other Backward Classes (OBC), and low to refer to Dalits or Scheduled Castes (SC) and Adivasis or Scheduled Tribes (ST). It is pertinent to note that the classification

of people into General or Forward castes, OBCs, SCs and STs is specific to India. We use "dominant caste" to denote the local power of a caste group, in line with its original use (Srinivas, 1955). Using these terms, rather than upper and lower castes, as have been predominantly used by researchers, may allow for further refinement to facilitate clearer and more direct references to the graded nature of the caste system (i.e., differential [dis]advantages), enabling greater precision in theorizing the implications of caste for various groups (e.g., middle castes, who have received less research attention) and across different contexts (e.g., accounting for regional variations). The flexibility that these terms afford also allows us to capture caste or caste-like systems that may be observed in other religions and parts of the world where the varna system was not prevalent.

In sum, even though management research on caste is substantial and recently accelerating, it is scattered across disciplinary domains and topics, and there is a lack of clarity about caste. To integrate this body of work and help future scholars make a stronger impact on research and practice, we organize our review with the help of an overarching framework (see Figure 1), which we briefly outline below and elaborate on in the following sections.

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Our framework brings together the manifestations of caste and the outcomes of caste across levels, as well as the mechanisms that lead to those outcomes. Specifically, caste manifests as a graded hierarchy, inherited membership, and a set of practices, which equip individuals with a repertoire of tools to conduct their socioeconomic lives. These tools shape the cognition, behavior, and relations of individuals, who operate within the institutions shaped by caste. As a result, caste influences outcomes at multiple levels, shaping individual opportunities and rewards, occupational concentrations, organizational practices and performance, and societal welfare.

Our intention in providing this summary overview is to connect the various constructs

to facilitate careful theorization and matching empirical testing. We recognize that some aspects that we have identified as mechanisms in one study can be examined as outcomes in another, e.g., social evaluations can be an outcome of stereotypes. Conversely, aspects that are investigated as outcomes in some studies (e.g., board diversity) might be invoked by others as mechanisms that in turn lead to different outcomes (e.g., firm performance).

HOW TO UNDERSTAND CASTE IN CONTEMPORARY LIFE

To distil an understanding of caste in contemporary life, we content analyzed (Table 1) the definitions that are explicitly presented in the papers in our review to identify the key aspects that are noted by the authors; reviewed the descriptions of the caste system that the authors provided as theoretical and empirical background to glean the implicit definitions used by the authors; and reviewed the discussion of caste in empirical papers, particularly qualitative papers that have generated rich data about the many ways in which caste manifests.

----- Please insert Table 1 here ------

Based on the above analysis, we clarify caste as a tacit ideology that involves a set of beliefs and norms about social stratification, which manifests as i) a *graded hierarchy* that rank orders groups and assigns civil, economic, and social rights and privileges commensurate to the group's rank; ii) a patrilineally *inherited membership* for individuals into one such ranked group that is permanent, which arbitrarily ascribes them an innate ability corresponding to the group's presumed inherent worth and also accords them concomitant entitlements; and iii) a *set of socially enforced practices* based on one's group membership that spans individual, familial, and social spheres, which are governed by norms concerning lifestyle, endogamy, and social intercourse. These interrelated but sufficiently distinct manifestations help to recognize caste in its contemporary forms and study it in management and organization settings.

Graded Hierarchy

The hierarchy of the caste system has distinct characteristics. First, in the caste

hierarchy, the criteria for ranking are unspecified. Although some scriptures specify that the ranking was made by God and some scholars argued that it is based on ritualistic purity (Dumont, 1980; Mosse, 1996; Srinivas, 2003), the fact that similar hierarchies are present in other religions (i.e., beyond Hinduism, for example, in Christianity, Islam, and Sikhism) and regions (e.g., Japan, Nigeria) indicates that, at least in practice, the criteria reflect an abstract idea or assessment of one group's superiority over the other, and the next group, and so on (i.e., graded in a hierarchy). Second, positions in the caste hierarchy assigned to groups are relatively fixed. Although advancement for a group in one dimension (e.g., gaining of financial or human capital) might improve its position in some contexts (e.g., influence in public services achieved by the Meena community of Rajasthan), this does not change the overall ranking, at least not in the span of a single generation. Third, a group's position in the caste hierarchy has an attendant set of rights to possess and access resources and opportunities, as well as a set of life privileges; the exact set of these rights and privileges vary based on context, but they span civil, economic, and social spheres of life (Bapuji & Chrispal, 2020).

The hierarchy we describe in somewhat general and abstract terms above manifests in numerous concrete ways in practice across many aspects of contemporary life. For example, groups may internalize their superiority and protect it with tools of varying strength (e.g., by denying access to public facilities to low castes, Mair et al., 2016), while those who are deemed inferior might come to accept this (e.g., by continuing to perform the assigned jobs, e.g., Mahalingam et al., 2019, even if they do such jobs solely in the hopes of providing a better life for their future generations, e.g., Shepherd et al., 2022). Some features of the caste hierarchy may have implications that operate in parallel to an organizational hierarchy, influencing it and clashing with it at times. For example, the caste hierarchy can collide with an organizational hierarchy, resulting in an individual's formal authority being challenged (e.g., when a low caste person is the manager of a high caste person), reinforced (e.g., when a high caste person is the

manager of a low caste person), or being accepted as absolute (e.g., accepting the manager's views as superior solely because a high position in the caste hierarchy implies overall superiority of the individual). Additionally, the differential rights and privileges given to a group in the hierarchical order (e.g., residential segregation) may subsequently also manifest as social networks within organizations and industries, or result in illtreating individuals who are performing "lower caste tasks" in the organization (e.g., toilet cleaners) (Zulfiqar & Prasad, 2022). Further, predispositions about an entire caste group being homogenous may manifest as strong stereotypes about castes, and influence hiring and job assignment decisions in organizations (e.g., Fernandez, 2018; Jodhka & Newman, 2007).

Inherited Membership

Individuals patrilineally inherit a fixed membership in their caste, which has three important characteristics. First, this membership may become an integral part of an individual's life, because it is often reflected in a person's name, e.g., the last name indicates the caste or family lineage in many cases, which often traces back to caste. As one's name carries importance to an individual (e.g., Dion, 1983), caste automatically becomes an integral part of an individual, even more so because it is reinforced in everyday interactions with same caste individuals due to caste-based residential segregation (Bharathi et al., 2022; Singh et al., 2019). Second, this membership arbitrarily assigns presumed innate abilities to individuals based on their group's assumed inherent worth in the graded hierarchy. This assignment then translates into opportunities and advancement in areas as commensurate to the presumed level of ability, which imposes restrictions for certain individuals in areas that require greater abilities than those presumed for them (while leaving the flexibility for individuals of higher presumed ability to also participate in areas for which lower ability might suffice). Third, unlike memberships that can be achieved through effort (e.g., alumni network) or the pursuit of a set actions (e.g., practicing a profession or a hobby), caste is ascribed, and invariably (even if

unknowingly) carried by, or attached to, individuals and plays an important role in many spheres of their lives.

Within organizational contexts, the implications of membership in a caste can be seen in high caste individuals' preference for certain types of jobs or dislike for jobs that are far removed from their caste's position in the graded hierarchy (e.g., a high caste person preferring knowledge professions and disliking cleaning tasks or physical labor, Mahalingam & Selvaraj, 2022). In contrast, for low caste individuals, caste membership might manifest in ways that might be interpreted as their lack of aspirations or as others seeing them as mere bodies that can be subjected to forced labor (Varman et al., 2021). Caste markers, such as shared last names, can yield benefits, like increased compliance with requests through incidental similarities (Burger et al., 2004), and, as with other memberships, in-group/out-group dynamics in caste foster homophily, impacting information sharing (Chen et al., 2015), network formation (Tsui-Auch, 2005), and social capital (Soundararajan et al., 2023). In addition, caste-based affinities might lead to the formation of groups along caste lines, resulting in those from other castes being automatically excluded from teams and other modes of interaction (Brewer, 1999) in various ways that are at odds with what organizational and task requirements may necessitate. Moreover, caste-based groups might lead to inefficiencies within organizations (e.g., due to caste membership influencing decisions or team dynamics), in ways that may have negative consequences for individuals (e.g., the wellbeing of those who are excluded, Bapuji et al., 2022), affect team performance, and make cooperation challenging (e.g., hindering solidarity in trade unions, Pandey & Varkkey, 2020; Varman & Chakrabarti, 2004).

Set of Practices

An important feature of the caste system is the presence of a set of practices concerning lifestyle, and social intercourse, including those that are related to endogamy and consequent family relations. These practices are adhered to by individuals and are socially enforced. At the

individual level, these practices relate to how one should conduct themselves in accordance with their caste positions, e.g., with respect to diet, attire, and behavior, as well as the occupations they should pursue. At the family level, these practices concern the choices of individuals regarding which group members they can marry. At the social level, these practices relate to which groups and individuals can interact with each other and in what manner, including considerations of touching the other person and sharing of food. In general, as with other widely shared practices that are expected to be followed, compliance leads to approval and violations lead to disapproval, with associated consequences for both.

Within the organizational context, the set of practices may manifest as food habits of individuals, such as vegetarianism, which may result in social conversations in the workplace being imbued with caste, e.g., questions about eating meat or not or discussions about the superiority of diets and lifestyles. These may result in separate kitchens and segregated seating arrangements in dining halls, or even entirely separate dining halls for vegetarians (Morris, 1965; Thomas, 2020). Such practices may also manifest within organizations as personal routines (e.g., sitting on the floor, standing up in the presence of others as a sign of respect, or offering to do chores for seniors, as noted in D'Souza & Marti, 2022), cultural programs (e.g., celebrating music and arts of the privileged culture, as noted in Thomas, 2020), or corporate events (e.g., Corporate Annual Day or team building exercises, as noted in Shakthi, 2023a). Endogamy, aimed at preserving caste purity, manifests in organizations through family relations, which naturally impacts family businesses, but also affects businesses broadly, as noted, for example, in the hiring of women directors from the same caste (Bhattacharya et al., 2022; Tumbe, 2022). Social interaction practices, favoring those in similar caste groups, lead to the sharing of task-relevant information with caste kin (Chen et al., 2015) or willingness to punish violators of caste-related norms (Hoff, 2011). Further, caste-imbued social interaction practices may result in excessive reliance on markers of status (e.g., elite school attendance) or

references being made to inherent competence (e.g., viewing those who use “reservations” as incompetent, Prasad et al., 2020) to include or exclude individuals from workplace conversations and networks. This exclusion may extend to online workplace forums and social media, which are now essential for work-related and social interactions, therefore shaping participation in religious ceremonies, art, and culture.

In short, the manifestations of caste may be seen in a range of work-related attitudes and beliefs, workplace behaviors and interactions, and organizational decisions. However, without sufficient context and background, these may not be acknowledged as being related to caste, even though they have a clear bearing on individuals and collectives.

WHAT IS THE IMPACT OF CASTE ON INDIVIDUALS AND COLLECTIVES?

The research we reviewed has revealed that caste influences a range of outcomes regarding individuals, occupations, organizations, and societies. In theorizing these outcomes or to explain their findings, scholars have invoked a variety of mechanisms, with the nature of that engagement varying. For example, less than 20 percent of quantitative studies (18 out of 99) have both theorized the mechanisms and empirically tested them (e.g., via mediation or moderation), while 17 theorized the mechanisms in developing hypotheses but did not directly test them. A clear majority of the studies in these two categories (26 out of 35) were published in the last ten years, reflecting growing theoretical and empirical rigor. Of the remaining quantitative studies, 42 discussed the mechanisms to explain, ex-post, the empirical findings, while 22 did not invoke mechanisms in a notable fashion in connection with the relationships they observed. For qualitative studies, mechanisms were theorized, evidenced in data, and discussed as part of the findings in 36 studies (46% of qualitative studies), while they were not theorized, but evidenced in data and discussed as part of the findings in 42 studies (53% of qualitative studies). Again, as a sign of the growing rigor in recent times, a clear majority of qualitative studies in both categories (21 out of 36 and 31 of 42) were published in the last ten

years.

We organize the mechanisms under cognitive, behavioral, relational, and institutional categories to reflect the range of ways in which caste influences outcomes (please see Table 2). Naturally, not all mechanisms fall neatly into these categories, and some can be considered in more than one category, e.g., access schema (Sutter et al., 2023) can be classified as an institutional mechanism because it is widely shared and taken for granted and also as a cognitive mechanism given that it is related to understandings about the distribution of resources.

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Of the mechanisms invoked across the empirical studies in our review sample, the most frequently discussed were behavioral (constituting 34% of the mechanisms discussed), followed by institutional (27%), cognitive (20%), and relational (16%) mechanisms, with the remainder being made up of papers (8 quantitative and 1 qualitative) in which we did not identify a clear discussion of mechanisms. This order of the prevalence of mechanisms remained the same across quantitative and qualitative studies, with the actual proportions varying. For example, qualitative studies discussed behavioral mechanisms more (in 38% of studies) than institutional mechanisms (in 25%), whereas quantitative studies discussed them equally (i.e., 29% for both behavioral and institutional mechanisms).

In terms of temporal variation, the use of cognitive mechanisms has increased over time (23% of the mechanisms discussed in papers published since 2017, compared to 17% before), indicating a growing interest in understanding how caste shapes the attitudes and beliefs of individuals. At the same time, while behavioral mechanisms remain the most frequently invoked category across time, their prevalence has somewhat reduced (32% of the mechanisms invoked in studies since 2017, compared to 38% before).

Mechanisms Influencing the Outcomes of Caste

The manifestations of caste influence outcomes via cognitive mechanisms, such as embodiment, categorization, and racialization. Together, these mechanisms influence an individual's understanding of oneself and others. Such mechanisms are relevant because the caste system attributes an inherent worth to each caste and ascribes an innate ability to those who are members of a caste, who may internalize, enact, and embody such understandings. For example, a large sample multi-method study by (Dasgupta et al., 2023) found that university students from low and middle castes (SCs, STs, and OBCs) scored lower than high caste students on willingness to compete, confidence, grit, and locus of control, and on all but one of the Big Five personality traits (i.e., conscientiousness, agreeableness, extraversion, and openness to experience). Pointing to the strong and distinct influence of caste, these effects were not dampened by socioeconomic status. Other cognitive mechanisms studied in research include the essentialization of class identity and social class (Mahalingam, 2003), attitudes toward self and others (Srinivasan et al., 2016), and *karmic* beliefs (Cotterill et al., 2014).

The manifestations of caste influence outcomes also via behavioral mechanisms, because caste prescribes a set of practices related to individual conduct and behavior. For example, tracing the history of the giving practices of the Kamma caste – a dominant caste in Coastal Andhra, Roohi (2023: 352) notes that "horizontal giving has become one of the key embodied markers of Kamma selfhood, recursively produced as a group trait of a globally dispersed community of professionals." Consistent with this statement, an experimental study found that Indian participants (who were mainly from high caste and high socioeconomic status, due to the nature of the sample) were more responsive to donation appeals and donated more when the identified recipient was a high caste individual (as compared to the recipient being a generic high caste group or an Indian group broadly), and that this effect was stronger when participants perceived themselves to be similar to the recipient (Deshpande & Spears, 2016). Another study of Indian entrepreneurs showed that those with low caste rank were more

likely to engage in philanthropy as compared to those with high caste rank, which the authors suggest is because low caste entrepreneurs were more likely to perceive societal inequalities and be motivated to address them (Hans & Vissa, 2023). Additional behavioral mechanisms studied include withdrawal of effort and self-rejection (Hoff & Pandey, 2005), refusal of job offers that are considered as being inferior to one's caste occupation, and even foregoing higher rewards if they are not seen as being consistent with one's caste status (Oh, 2023)

The manifestations of caste influence outcomes via relational mechanisms as well, because caste ideology involves a set of rules for relationships. Discussing the influence of caste on business relations, Soundararajan et al. (2023) note that *Gounders* (a dominant caste in Tirupur) provide entrepreneurial and managerial opportunities to members of their caste (e.g., providing credit, giving contracts, appointing to managerial roles), but restrict these for low caste individuals. Several other studies point to the importance of caste-based relations in a particular trade, such as banking by Chettiars (Nair, 2016) and U.S. motels by Patels (Dhingra, 2012). As we discuss in the sections on individual outcomes and occupational outcomes, arguments relating to caste homophily and network formation have been used in several studies (e.g., Bhardwaj et al., 2022; Damaraju & Makhija, 2018; Vissa, 2011).

Finally, the manifestations of caste influence outcomes via institutional mechanisms because the ideology of caste has sedimented over millennia, resulting in social norms relating to interactions across castes (Bhatt, 2022) and access schema, i.e., the ways in which resources are used in practice, and who can access and utilize these resources (Sutter et al., 2023). For example, the efforts of Gram Vikas, an Indian NGO, to provide tap water and toilets to every household in the villages they operate in faced resistance from high castes, who saw sharing the same water source as a threat to their superiority and purity (Mair et al., 2016). While these norms maintain caste as an institution, as we discuss in the section on societal outcomes, social enterprises engage in boundary work to improve social welfare (Qureshi et al., 2018; 2022).

Outcomes of Caste

Having discussed the categories under which we organize the mechanisms of caste in Table 2, we proceed to discuss outcomes of caste, which we organize by level of analysis: individual, occupational, organizational, and societal (please see Table 3). The prevalence of outcomes across these levels that are examined in the empirical studies in our review is: individual (in 42% of studies), organizational (26%), occupational (16%), and societal (16%). In both quantitative and qualitative studies, individual level outcomes make up the most frequently studied category. However, quantitative studies focused more on individual-level outcomes (54% of outcomes in quantitative studies vs. 33% in qualitative studies), while qualitative studies paid greater attention to societal outcomes (24% of outcomes in qualitative studies vs. 4% in quantitative studies).

In terms of temporal variation, there is growing interest in understanding the influence of caste on outcomes at occupational and societal levels, while examinations of outcomes at the individual level are becoming less prominent. Specifically, 50% of the outcomes studied in empirical articles published before 2017 were at the individual level, which drops to 33% in studies since 2017. Conversely, outcomes at the occupational and societal levels together account for 38% of articles since 2017, up from 23% for articles published before 2017.

Based on the distributions of the empirical studies in our review in a 4x4 matrix, constituted by the four levels of outcomes and the four categories of mechanisms, we note three points. First, studies that examine individual level outcomes using behavioral mechanisms constitute the most populated cell (13%). This is followed by studies investigating individual level outcomes but invoking institutional mechanisms (11%), with the third most populated cell comprising studies exploring organizational level outcomes referencing behavioral mechanisms (9%). Second, while behavioral mechanisms are overall the most frequently used category, and also the most invoked category to study outcomes at the individual, occupational,

and organizational levels, they are narrowly outranked by the use of institutional mechanisms (38% versus 39% of the mechanisms that are discussed) in studies that investigate outcomes at the societal level. Third, cognitive mechanisms are most prevalently used in studies that investigate occupational level outcomes (26% of empirical papers that invoke cognitive mechanisms examine such outcomes), while relational mechanisms are most commonly used in studies of organizational level outcomes (40% of empirical papers that invoke relational mechanisms study such outcomes).

In providing an overview of the outcomes in the remainder of this section, we also mention mechanisms where pertinent. However, to avoid excessive repetition of the word, we will also refer to mechanisms via phrases such as: through, due to, results from, because of, and as a result of. Further, when we discuss findings from contexts other than India, we specifically refer to the country context, but do not explicitly mention the country in the case of an Indian context. Nevertheless, we occasionally refer to India to foreground the distinction. Given that relatively few studies are set outside of India, and there are variations in the caste system in those countries, we review those studies in a separate sub-section, after our discussion of individual, occupational, organizational, and societal outcomes.

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Individual outcomes of caste

We organize our discussion of findings related to individual outcomes under differential opportunities and differential rewards.

Differential opportunities

Studies have shown that opportunities that are available to individuals are influenced by their caste, with a focus on access to employment and entrepreneurship.

Access to employment is influenced by caste, such that individuals from low castes have lower access to employment. For instance, Thorat and Attewell (2007) found that, as

compared to an applicant with a high caste Hindu name, equivalently qualified applicants with Dalit names had an odds ratio of 0.67 to be invited to the next stage of the job selection process, i.e., receive a call for an interview or to report for a written test. Similar results were found in other studies, which suggested that these relationships might arise due to the mechanism of statistical discrimination. For example, Banerjee et al. (2009) found a large and significant difference between call-back rates for high caste and other applicants for call center jobs that required soft skills (e.g., English-speaking abilities, telephone etiquette) but not for software jobs that required technical knowledge, which can be acquired through formal education (e.g., an engineering degree) or ascertained through credible certifications (Banerjee et al., 2009).

Providing some evidence of mechanisms that drive differential access to employment, Siddique (2011) found that the differences in call-backs that favor high caste applicants are significantly larger when hiring is done by Hindu male recruiters, which the author argued was partly due to taste-based discrimination or prejudice, beyond statistical discrimination. Damaraju and Makhija (2018) found that candidates who belong to the same caste as firm owners or the chairperson are preferred in CEO appointments, particularly when the candidate is an outsider to the firm, which the authors argued happens because caste serves as a source of information about outsider CEO candidates.

Moving on to differential opportunities regarding entrepreneurship, research has shown that middle and low caste individuals are less likely to be entrepreneurs than their high caste counterparts (OBCs 5 percent less likely, STs 11 percent, and SCs 22 percent less likely) due to mechanisms that compel, and result from, individuals in the former category to believe that "it is socially unacceptable for them to start businesses" (Audretsch et al., 2013: 780). Similar results were reported by Sarkar et al. (2018), who found that middle and high caste groups are more likely to be employers or self-employed, compared to STs (who were the reference group). The authors also found that SCs are less likely to be self-employed compared to STs,

although no such difference was found between the two groups for being employers. It appears that SCs face challenges in entrepreneurship more than other low caste groups because of the unique disadvantages they face, such as untouchability, segregation, and exclusion from civic life (Jodhka, 2010). Further, Sarkar et al. (2018) found that entrepreneurship is lower in areas with high caste heterogeneity, which they suggested was likely due to relational mechanisms that make it difficult to form social networks across caste boundaries.

A number of studies suggest a lack of social capital as a contributing mechanism to the limited access to entrepreneurship that low castes face. For example, Vissa (2011) found that entrepreneurs exhibited caste-homophily, i.e., a preference to form ties with those who are similar in terms of caste, although such intentions did not appear to have materialized as inter-organizational ties, contrary to the study's original hypothesis. Similar to racial minorities who have lower access to entrepreneurship because of less resourceful social networks or because of their lower status in networks (Younkin & Kuppuswami, 2018; Bruton et al., 2023), Dalit entrepreneurs face challenges in forming partnerships with high caste entrepreneurs. One study found that Dalits in such partnerships are "relegated to the position of junior partners or even reduced to the position of supervisors" even when economic activities are legally carried out in their name (Prakash, 2015: 104). Lack of social capital was also noted as a major reason why Dalit labor contractors in Tirupur textile supply chains were unable to achieve economic mobility through entrepreneurial activity and are stuck in precarity (Soundararajan et al., 2023).

Another impediment that low caste individuals face in pursuing entrepreneurship is access to credit. For instance, Fisman et al. (2017: 485) note in their conclusion that "74.4 percent of the officers belong to the General Class category. This implies that the probability of a backward caste borrower (SC, ST, or OBC) facing unfavorable loan conditions is nearly 75 percent, purely for reasons of cultural affiliation." The authors also found that when a new loan officer is assigned to a bank branch, new loan recipients who are of the same caste as the

officer and the total amount of loans to these recipients increase by an average of 5.7 and 6.5 percent, respectively. More generally, caste influences a range of credit-related phenomena, from access to credit and approval rates (Baland et al., 2019; Kumar, 2013; Kumar & Venkatachalam, 2019), to chances of receiving credit (Patel et al., 2022), to the quantity of credit received (Fisman et al., 2017), as well as borrowing costs (Fisman et al., 2017).

Differential rewards

Studies have also revealed differences in financial and non-financial rewards that are associated with individuals' caste.

In terms of financial rewards, scholars, predominantly economists, have found that caste plays a role in income gaps. For example, using multiple waves of India's National Sample Survey data, Madheswaran and Attewell (2007) found that SC/STs and OBCs experience lower returns to education compared to high castes, and that the former groups receive lower incomes from employment. Although the wage gap varies across surveys and has reduced over time, the authors conclude that about 15 percent of the gap for SCs/STs is unexplained by endowments and can be attributed to discrimination based on caste. However, the authors noted that caste might, in fact, be responsible for an even larger gap in incomes because caste enables and constrains some of the endowments that contribute to variation in incomes (e.g., education, occupation) as well.

A similar multi-wave study, focused more specifically on the trends in gaps between SC/STs (low caste) and non-SC/STs (middle and high castes), found that gaps in education, employment, and wages between the two groups are decreasing over time. Specifically, the authors noted that the "median wage premium of non-SC/STs relative to SC/STs has declined systematically from 36 percent in 1983 to 21 percent in 2004–2005" due to mechanisms that are linked to education (Hnatkovska et al., 2012: 275). These declines happened across the spectrum, except in the top 20 percentile of the households, where the gaps widened.

Contextualizing their findings against the backdrop of broader inequalities, the authors noted that the overall reduction in wage gaps that is experienced by SC/ST in India is much greater than that experienced by Blacks and Hispanics in the U.S. (Hnatkovska et al., 2012). Focusing specifically on the incomes of entrepreneurs, Deshpande and Sharma (2016) found an unexplained earnings gap of at least 20 percent between businesses owned by SC/ST and those owned by non-SC/ST, which the authors attribute to caste-based discrimination.

The differential wages afforded to different castes have also been noted in some qualitative studies. For example, Zulfiqar (2019) highlighted that domestic workers in Pakistan experience precapitalistic forms of exploitation where payments are not monetary but in-kind, e.g., leftover food and used clothes, which is an extension of the *begar* system in which individuals (mainly low castes) were forced to work for free or in return for food only. Additionally, Gupta (2022) noted that the labor of Dalits employed as cleaners in Indian railways is undervalued, as seen in payments to them below minimum wages and in delays to settling those payments.

In addition to differential financial rewards, studies have also uncovered differences in non-financial rewards, such as dignity and credibility given to individuals. For example, as "essentially" polluted individuals, Dalit janitors are deprived of dignity *in* their work by being humiliated, where the "demonstration of reverence" (e.g., using subservient language, addressing high caste individuals with honorific titles, and avoiding eye contact) toward high caste individuals induce low self-esteem for them (Mahalingam et al., 2019: 215). The identification of Dalits as "sweepers or scavengers" likewise dehumanizes them by rendering their work as dirty and gives them a sense of wretchedness (Mahalingam & Selvaraj, 2022: 815). Such workers are also denied of dignity *at* work, as seen in unsafe working conditions and precarity (i.e., lack of economic and social security, such as health insurance, sick leave, or retirement benefits) around their work (Mahalingam et al., 2019).

Denial of dignity to low caste workers (e.g., those from the caste of *Chamar*, who work with animal hides or the caste of *Bhangi*, who clean toilets) can result in these workers accepting that their labor is unclean and in their constructing "inauthentic" identities for themselves, such that they are aligned with caste ideologies rather than their identities as valuable humans. The construction of such inauthentic identities then prevents these individuals from participating in and fruitfully leveraging "market systems" and the "marketing systems" they are embedded in, which could provide them with a source of income and dignity (Jagadale et al., 2018: 95).

Caste also influences credibility, which refers to someone being "capable of being believed" or "having or deserving credit or repute" (Zhu et al., 2016: 863). Higher social standing and historically held positions of power and authority lead to high castes being considered more credible and trusted, for example, within the spheres of science and research (Thomas, 2020). Low caste individuals struggle to gain credibility or find opportunities to gain recognition even when they possess the necessary skills and knowledge (Fernandez, 2018). For example, low caste entrepreneurs are "either held in doubt or contempt" by high castes (Prakash, 2015: 99). These challenges faced by low caste individuals are further underscored by Zhu et al. (2016), who found that while evaluators who hold egalitarian ideologies generally assess low-status researchers (i.e., [non-Indian] Asians, women) to be more credible than their high-status counterparts, they do not assess low caste researchers as more credible than their high caste counterparts.

Summary of individual outcomes

In sum, the work we reviewed shows that opportunities and rewards available to individuals vary according to the position of their caste in the graded hierarchy. Individuals experience differential access to employment likely because of both statistical and taste-based discrimination mechanisms, while differential access to entrepreneurship is due to mechanisms

related to access to credit and social capital. Individuals also experience differential financial rewards, as reflected in the income gaps faced by low caste individuals, which remain substantial despite their reduction over time. Finally, high caste individuals are given greater credibility and respect, while those from low castes experience denial of credibility and dignity.

Occupational outcomes of caste

Since a central feature of the caste system is occupational assignments and entitlements, the role of caste in professions is a vibrant area of inquiry. This research showed that occupations are segregated by caste, such that elite jobs are predominantly held by individuals from high castes while menial jobs are performed by those from low castes. Highlighting this segregation, Mosse (2018) noted that jobs are caste-typed. However, the mechanisms through which this segregation arises, and is managed, differ for elite and menial jobs.

Concentration of high castes in elite professions

The concentration of high castes in elite jobs has been documented widely, across a range of professions, such as the media (Oxfam India, 2019), judiciary (Gadbois, 2011), accounting (Sian & Verma, 2021; Sidhu & West, 2014) and university faculty (Joshi & Malghan, 2017; Vijay & Nair, 2022). 98% of faculty members in the 20 elite business schools in India (i.e., IIMs) are reportedly from the forward castes (Joshi & Malghan, 2017), whose share in the population is commonly estimated to be less than 20% (Piketty, 2020). The concentration of high castes in elite jobs has also been noted by management scholars who conducted research in such settings, e.g., prevalence of high caste individuals among CEOs and firm owners or chairpersons (Damaraju & Makhija, 2018), concentration of few castes and communities in firm ownership (Mani, 2021), all entrepreneurs in a study sample being from high castes (Vissa, 2011), and over 90% of board members being from high castes (Bhattacharya et al., 2022; Dayanandan et al., 2019). In global value chains, too, high-value adding activities are primarily undertaken by individuals from high castes (Munshi, 2007;

Knorringa, 1999) or dominant castes (Soundararajan et al., 2023), which Mosse (2018) referred to as "market ranking" along the lines of ranking by caste.

Given the long history of caste, the concentration discussed above may have occurred due to various reasons. For example, Sian and Verma (2021) argued that the concentration of Brahmins and other high caste individuals in the accounting profession may have solidified during the colonial period, during which the British needed accountants and nurtured a collaborative elite (where elites were made up primarily by high castes), just as they nurtured and co-opted middle- and high-class segments (aristocrats and educated professionals) in England for managerial roles. While the support of elites might have facilitated concentration during the colonial era, the contributing factors were different in the pre-colonial era. For example, ancient kingdoms (e.g., Mauryan Empire, 322 BCE-185 BCE) were governed by the book *Arthasastra* – meaning science of wealth, that focused on accounting and, more broadly, securing the kingdom's wealth and societal welfare. Brahmins, who were perceived as embodying the skills and disciplines needed for governance, were seen as the natural choice for governance roles (Murthy & Rooney, 2018). Other institutional mechanisms, such as those related to segregation, prescribed by the *Arthasastra*, may also have helped Brahmins and other high castes to subsequently retain knowledge within their groups over time (Sian & Verma, 2021).

While ruling class support, embodiment, and segregation may have resulted in the concentration of high castes in elite professions in the past, three contemporary mechanisms appear to have played a role in the reproduction of this concentration of high castes in elite professions. First, the "institutional myth" of meritocracy (Amis et al., 2020) resulted in Brahmins (and other high castes) being presumed as having the required merit for these roles, although such merit was achieved through intergenerational access to education that many others lacked (Subramanian, 2015; 2019). Second, the concentration of high castes in elite

professions is maintained because of the impermeability of social networks for middle and low castes, due partly to network closure by high castes (Bhardwaj et al., 2021). Such network closure has also been noted in research on social class and gender, where elite professional services networks exclude individuals who are not from privileged backgrounds (Rivera, 2016) and the "Old Boys Networks" exclude women from male-dominated "elite" occupations like law enforcement or medicine (Lloyd-Jones et al., 2023). Third, caste-based homophily helps individuals to maintain and improve performance by providing informational benefits across a range of contexts that range from CEO selection (Damaraju & Makhija, 2018) to accuracy of analyst forecasts (Vissa, 2011). In turn, such performance strengthens the logic of meritocracy, which privileges high caste individuals who may have achieved those positions due to intergenerational access to education and elite spaces.

Overall, the concentration of high caste individuals in elite jobs ranging from banking (Rudner, 1994) to ownership of vegetarian South Indian restaurants (Iversen & Raghvendra, 2006) and motels in the US (Dhingra, 2012) appears to result from mechanisms such as ruling class support, embodiment, segregation, meritocracy, network closure, and homophily.

Concentration of low castes in menial professions

As a converse to the concentration of high caste individuals in elite professions, scholars have noted the concentration of low castes in menial professions such as janitorial work (Mahalingam et al., 2019; Mahalingam & Selvaraj, 2022), waste work (Shepherd et al., 2022), and domestic work in Pakistan (Zulfiqar, 2019; Zulfiqar & Prasad, 2021). Scholarship in this area, comprising mainly qualitative studies, highlights the processes of racialization of low caste individuals and stigmatization of the jobs they do, as well as the identity work through which low caste individuals make sense of their jobs and come to accept them, which together contribute to creating and maintaining this concentration.

Racialization refers to social and material relations of caste that lead to the production

of the racialized "other" (Gupta, 2022: 239). For example, the caste obligations of Dalits and the perception that they are inherently polluted result in them being limited to menial occupations, such as disposal of dead bodies, toilet cleaning, and rag picking. These types of work invoke multiple types of taint – physical taint due to cleaning, social taint based on servility, and moral taint on the basis of tasks that are considered distant from civility (Shepherd et al., 2022). As a result, these jobs are considered "dirty," which, in turn, denies the workers social acceptance and dehumanizes them (Mahalingam & Selvaraj, 2022: 815), making them "aliens" (Jagannathan et al., 2016). The twin processes of racialization and stigmatization escape scrutiny because racialization of low castes allows public discourse to label Dalit janitors as lazy and invisibilize their work, even in times of crisis when they make crucial contributions to restore civic life in cities (Mahalingam et al., 2019). Similar processes of racialization and stigmatization are also noticed in urban Pakistan, where notions of dirt and foreignness (i.e., worker's body being foreign in the intimate space of and relationships within the home) are combined to racialize the migrant, low caste women workers, and stigmatize their occupation of domestic work (Zulfiqar, 2019).

In addition to racialization and stigmatization, workplace humiliation and exploitation were also deployed by employers to keep them in menial jobs. For instance, in a study of women domestic workers, Varman et al. (2023) found that employers maintained existing power relations and powerlessness of domestic workers using a range of practices, which the authors categorized as: symbolic humiliation, e.g., serving food in separate dishes; sexual humiliation, e.g., groping and rape; and physical humiliation, e.g., slapping. These humiliations allow employers to exploit workers by paying low wages, denying basic necessities (e.g., not allowing the use of fan even when it is very hot), and imposing degrading work (e.g., repeatedly flushing and cleaning the toilet after the employer family members use it).

In short, low caste individuals are racialized as the Other, the untouchables, and

assigned "dirty" jobs, the performing of which racializes them further because they perform "polluted" tasks (Gonzalez-Sobrino & Goss, 2019; Gupta, 2022). As different from individuals of a lower social class who undertake work that is "polluted" or associated with "physical dirt" (Slutskaya et al., 2016), the processes of racialization that are noted in the caste literature are based on inherent taint that is assigned to Dalits, which renders them suitable only to those occupations. This notion of inherent taint is also different from the racialization of Latino workers who are subjected to menial work because it is "in their nature," or the racialization of Blacks because their bodies were made for physical labor (Maldonado, 2009; Ray, 2019). Because racialization based on caste is not based on visible phenotypical features but on presumed innate inabilities and inherent impurity, racialization occurs through practices involving touch and distance, in ways that are not documented in this manner in research on race, gender, or class.

The concentration of low castes in menial professions is maintained in part because individuals from low castes adopt and internalize these racialized identities, even if they sometimes craft alternative identities to cope with the stigma attached to them and their work. For instance, individuals from the *Jhariya* caste embrace the "potter" identity strongly and consider marrying outside of the community as "anathema," and strip the "potter" status of their caste kin who choose not to work with the potter wheel (Natrajan, 2005). As another example, scholars noted that low caste ragpickers embedded in "intractable work" sustain themselves in such work through functional ambivalence, or the concurrent experiences of opposing meanings of helplessness and survival, destiny, and hope (Shepherd et al., 2022). Noting similar identity work, Mendonca et al. (2022) showed that cleaners were able to construct alternative identities by aligning themselves to the prestige and status of their clients and employers, i.e., the status derived from working with a prestigious organization overshadowed the "dirty" work that they do. In addition, these individuals derived a sense of

self from being able to earn a type of livelihood that is not available to their caste kin and the pride that comes from the responsibility of cleaning (Mendonca et al., 2022).

Summary of occupational outcomes

In sum, elite professions have predominantly remained the domain of high caste individuals due to historical factors and implications of mechanisms such as meritocracy and social networks, whereas menial professions continue to be filled with low caste individuals through mechanisms of stigmatization and devaluing of those jobs and racialization of low caste individuals. To manage that stigmatization and racialization, low caste individuals engage in complex identity work, ranging from strictly embracing their identity to constructing alternative identities, which in turn, contribute to maintaining their concentration in menial professions.

Organizational Outcomes of Caste

Caste-related outcomes for individuals and occupations that we summarized above often occur in the context of organizations. Accordingly, scholars have examined the influence of caste on the practices and performance, both financial and non-financial, of organizations.

Organizational practices

The studies that have explored the influence of caste on organizational practices have examined aspects that are broadly related to hiring, inclusion, and diversity.

Hiring. Studies have documented reduced opportunities available to low caste individuals across public and private sector organizations (Thorat & Attewell, 2007) and firms that are global as well as those that are predominantly domestic (Damaraju & Makhija, 2018; Jodhka & Newman, 2007). Nevertheless, Siddiqui (2011: 152) found that the largest disadvantages in call-back for low caste applicants occur in smaller firms, i.e., those "without multiple domestic offices and without a foreign office."

Based on a qualitative study of 25 HR managers in large firms operating in India,

including multinational firms, Jodhka and Newman (2007: 4131) noted that even though "patrimonial ties, reciprocal obligations and birth right" in guaranteeing jobs is no longer a reality, similar caste-related mechanisms now mostly operate under considerations of family background. The authors note that while hiring managers emphasize that they hire based on merit alone, they also often ascertain family background to assess the suitability of candidates, during which they also use caste stereotypes (e.g., Dalits lack confidence). The authors note as well that hiring managers are generally opposed to reservations that aim to level the playing field for low castes. Accordingly, low caste individuals might experience lower success in hiring due to a mechanism whereby hiring managers hold negative attitudes towards affirmative action and perceive low caste individuals who are subject to reservations as being incompetent or unworthy (Combs & Nadkarni, 2005; Prasad et al., 2020).

Inclusion. The assignment of jobs in organizations can reflect caste stereotypes that persist in society (Banerjee & Knight, 1985; Thorat & Newman, 2010). For instance, in her qualitative study of the IT sector in India, Fernandez (2018: 169) finds that individuals from low castes end up in relatively low-end jobs, such as coding and data entry, even if they have the qualifications that would make them suitable for higher-end jobs, because low caste individuals are considered "incompetent" while high castes are "born intelligent." Such mechanisms that essentialize caste identities and create and sustain caste stereotypes, when coupled with the inevitable presence of manager discretion in assigning tasks, resources, and projects, lead to the exclusion of low caste individuals from higher-status jobs (Banerjee & Knight, 1985; Fernandez, 2018).

Another set of articles explores how caste shapes norms of interaction within organizations, particularly with respect to the creation of segregated caste-based spaces (Thomas, 2020). For example, an ethnographic study at the Indian Institute of Science (IISc) found that the institute created separate cafeterias and washbasins for vegetarians

(predominantly Brahmins) and non-vegetarians (predominantly middle and low castes), to maintain ritualistic purity between the castes, as consuming meat was seen as impure. Additionally, the types of dance and music that are celebrated by the organization (IISc) often privilege the dominant culture and thus the corresponding events were attended primarily by Brahmin scientists (Thomas, 2020). Another study on the IT industry in India found that these norms of interaction also extend to corporate events. For instance, the PayPal office in Chennai celebrates its Corporate Annual Day with "team building exercises" and functions. In these events, employees were assigned to teams with names that are associated with different caste groups, e.g., Tamil Nadu Iyers and Kerala Namboodiris. When employees complained, the local managers did not respond, resulting in protests by employees, which received media coverage and drew the attention of the company's US headquarters. Subsequently, the local office issued an apology and dropped the caste names, but the Annual Day function had a theme of showcasing wedding celebrations of each state, which in practice resulted in showcasing the weddings of Brahmin families and alienating employees from other castes (Shakthi, 2023a).

Diversity. Caste can also influence organizational diversity, primarily in terms of the caste hierarchy being reproduced within organizations, e.g., as organizational hierarchy, as studied at a macro-level by economists. For example, using data from the India Human Development Survey and their own survey data, Aggarwal and colleagues (2015) showed that high castes occupy high and middle positions in organizations, whereas Dalits occupy low-level positions that involve physical labor. Similar patterns were reported by other studies (e.g., Hnatkovska et al., 2012) and government reports (Government of India, 2016). These imply that caste diversity within a given level would be low, particularly at the high and low ends of the organizational hierarchy.

Research conducted with organization-level data has mainly focused on diversity in the upper echelons of organizations. For example, examining the boards of 4,005 publicly listed

Indian firms, totalling 34,772 members, Dayanandan and colleagues found that corporate boards are highly caste homogenous (Blau-Index median of zero, and a mean of 0.111). The majority of board members (>50%) were from the same caste in the boards of 96% of firms. The authors also found that Brahmins, Vaishyas, and Kshatriyas, all high castes, account for 94.01% of directors, even though they represent less than 20 percent of the population. Conversely, SCs/STs occupied only three board positions – all with the surname Meena and all in government enterprises that are subject to reservations (Dayanandan et al., 2019). This exclusion of low caste individuals continued even when gender quotas resulted in the addition of 1,307 new directors to Indian boards, increasing the proportion of women directors on boards from 5.4% in 2013 to 15.1% in 2018. However, 92% of women directors in 2018 were from high castes, and 93% of incoming women directors were from high castes (Bhattacharya et al., 2022). This majority exclusion is comparable to, or even worse than, that in South Africa, where the percentage of board members who were Black (whose population share is also 80%, i.e., similar to the percentage of middle and low castes in India) stood at 34% in 2012, increasing from 13% in 2002 (Mans-Kemp & Viviers, 2015).

In a rare study that examined the mechanisms through which caste diversity might be enhanced, Garg and colleagues found that caste diversity in Indian MNEs increases as a function of their exposure to stakeholder norms from developed economies (measured as a product of the firm's investment in a country and quality of institutions in that country). Additionally, the authors found that this positive effect is stronger when the social embeddedness of the MNE (measured as prominence and brokerage position) is higher in the firm-bank network, but weaker when the MNE's social embeddedness in the family kinship network is higher (Garg et al., 2023).

Organizational performance

Financial performance. Dayanandan et al. (2019) showed that firm value (measured as

market capitalization over assets) is reduced when a firm has low caste diversity on the board or when its directors are interlocked to firms whose boards are predominantly occupied by the same caste. Providing additional evidence, Bhagavatula et al. (2023) highlight that caste homogeneity in Indian corporate boards has a negative association with firm value and performance, which they argue occurs because "homogenous directors are likely to have overlapping perspectives, networks and information sets" (p.19). As different from these findings, which show negative implications of low caste diversity for performance, Damaraju and Makhija (2018) found that, on average, firm performance (ROA) is not affected in a statistically significant manner when CEOs who are appointed are of the same caste or religion as the owner or chairperson of the firm.

Non-financial performance. This stream of research has focused on the influence of caste on work performance and corporate governance.

In a quasi-field experiment in India's manufacturing sector, Afridi et al. (2020) found that group output increased by 18 percent for socially connected workers (i.e., those who belong to the same caste and resided in the same locality), while coordination improved by 30-39 percent. The authors argued that these performance benefits were due to pro-social motivation, i.e., the motivation to improve one's own profit and the profit of their co-workers, in socially connected groups. Additionally, Chen et al. (2015) found that the accuracy of analyst forecasts was higher when they shared a caste affiliation with the CEOs of the companies they covered, presumably because the analysts could gather more information from the CEOs in such cases. The authors found that this effect was weaker for post-reform-generation CEOs (compared to pre-reform-generation CEOs), who are argued to be less influenced by caste affinity and more by contemporary mechanisms such as school ties. The authors also found that analysts' school tie with post-reform-generation CEOs accentuated the accuracy of their forecasts, lending further credence to the information gathering mechanism

facilitated by social similarity.

In contrast to caste similarity's positive effects on task performance, it seems to inhibit good corporate governance, in that it predicts CEO or board member appointments. Studies found that boards hire CEOs who belong to the same caste as that of the majority of the board (Dayanandan et al., 2019), and also that CEO candidates who are from the same caste or religion as the firm's owners or chairpersons are more likely to be appointed (Damaraju & Makhija, 2018). As noted earlier, in cases where women directors were hired following gender quotas, the chances that new appointees were from high castes were higher and this was also related to the proportion of high caste directors who were already on the board (Bhattacharya et al., 2022). The proportion of high caste members in a firm's board was also positively associated with that firm's board interlocks with other firms who had boards of a similar composition, i.e., having a high proportion of high caste members, thus constraining the firm to have fewer interlocks and limiting benefits that can be derived from more diverse and extensive interlocking (Dayanandan et al., 2019). In line with the possible implications of these findings about corporate governance, audit quality was also found to be lower when the auditors of a firm are of the same caste as the majority of that firm's board members. The authors argued that the mechanisms that led to this outcome was that caste-related auditors would be less willing to disclose or report a breach (Dayanandan et al., 2020).

Some studies examined organizational performance to test the conjecture that affirmative action compromises merit and, thus, organizational efficiency. These studies showed that organizational performance has not suffered due to the implementation of reservations in railways (Deshpande & Weisskopf, 2014) or bureaucracy (Bhavnani & Lee, 2019). Instead, a study of public sector enterprises showed that firms that implemented reservations performed better on a range of financial and non-financial performance indicators, with this relationship being stronger if the reservations were implemented across levels of the

organizational hierarchy rather than being limited to lower levels of it (Jain & Abraham, 2023).

Summary of organizational outcomes

In sum, research examining the implications of caste for organizational outcomes has shown that routines and practices in organizations disadvantage low caste individuals in hiring, due to stereotypes and the use of criteria that favor high caste candidates to the detriment of low caste candidates. Even when low caste individuals succeed in getting hired, they then struggle to gain coveted assignments and fit within prevalent organizational practices, owing to mechanisms that follow from organizational spaces being imbued with high caste practices. Consequently, caste hierarchy ends up being reproduced as organizational hierarchy, with high castes occupying the upper echelons. These effects of caste, in turn, have an overall negative effect on firm performance and corporate governance, despite also having some benefits, such as improved coordination and communication due to mechanisms that have to do with caste homophily.

Societal Outcomes of Caste

The outcomes of caste we have reviewed so far indicate that caste may impede societal welfare, defined as "the well-being of a society as a whole, encompassing economic, social, physical, and spiritual health" (Jones et al., 2016: 220). Indeed, studies examining societal outcomes have shown that societal welfare is hindered due to the influence of caste on societal dynamics. However, this research also showed that social sector organizations can creatively achieve their objectives of societal welfare, and that collective movements of Dalit women and grassroots organizations can disrupt caste inequalities and enhance societal welfare.

Challenges caste poses for societal welfare

Caste hierarchies are maintained by differential access to resources and opportunities for high and low caste groups. As such, they hinder the development work of social enterprises and non-governmental organizations (NGOs) that attempt to improve livelihoods and living

conditions in villages. For example, the efforts of Gram Vikas, an NGO, to provide tap water and toilets to every household faced resistance from high castes, who saw sharing the same water source as a threat to their superiority and purity (Mair et al., 2016). Noting a similar challenge, Sutter et al. (2023) argued that resource provision by intermediaries is hindered by mechanisms that are related to access schema, i.e., the ways in which resources are used in practice, and who can, in fact, access and utilize these resources. Even though following such an access schema would reduce the risk of antagonizing high castes, it would also limit how much the social enterprise can fulfill its goals of alleviating inequality.

In the same vein, quantitative studies have noted impediments to trading across caste groups. For example, the adoption of new seed varieties is higher when farmers receive them from their caste kin (Emerick, 2018), and agricultural incomes of low caste farmers are higher when they are of the same caste as that of water sellers, because water trading faces barriers due to caste (Anderson, 2011). Qualitative studies showed that efforts to increase agricultural productivity and improve food security in villages were marred by uneven access to land and exclusionary norms of interaction between low and high caste groups, and men and women (Bhatt, 2022). For example, when a social enterprise attempted to record and screen the best practices of productive farmers within the same social context, low caste farmers hesitated to share their knowledge due to fear of retaliation by high caste farmers (Qureshi et al., 2022). When the social enterprise attempted to disseminate knowledge through video screenings, exclusionary norms of caste and gender posed challenges in forming screening groups and generating knowledge-sharing by the women and low caste individuals, who were predominantly involved in farming work and were key to knowledge sharing and application.

To overcome the challenges posed by caste, organizations adopt a range of strategies. One of the most discussed is “scaffolding,” or the changing of entrenched patterns of behavior and interaction, which occurs through “mobilizing institutional, social organizational and

economic resources;" concealing the motives to gain acceptance from the high castes; and stabilizing new patterns of interaction that are representative of a different social order (Mair et al., 2016: 2021). For example, to secure the cooperation of high caste groups for its program to provide water taps and toilets to every household, Gram Vikas suggested that without proper access to water and sanitation, low castes would defecate "all over the place" and pollute the groundwater, which would compromise the purity of the high castes (Mair et al., 2016: 2033). Such disguising of its motives helped reduce resistance and generate new forms of interactions, which over time resulted in the different castes sitting together, eating together, and working together – all of which depart from caste norms. Similar success was achieved by another social enterprise that engaged in "value work" to slowly disrupt existing patterns of interaction (e.g., low castes not entering the houses of high castes and showing deference towards them) and enable new ones, such as trained Dalit women entering the homes of high caste individuals to repair and install solar panels, and even "looking them in the eye" (Chatterjee et al. 2021:15).

An integral part of scaffolding is boundary work, which has been documented in multiple studies by Qureshi and colleagues. The authors noted that some partners of the social enterprise they studied encouraged the inclusion of women and low caste groups in screenings, and facilitated dialogue across caste divides by tactfully setting rules for screenings and norms for interaction (Qureshi et al., 2018). Further, inclusion was promoted under the guise of the benefits to be gained from diverse sources of knowledge (Qureshi et al., 2022) or by first conducting screenings for low caste women, who were less subject to norms than high caste women whose social standing would be diluted by interactions (Qureshi et al., 2023). Such boundary work created space for group members to combine and reconcile their prior knowledge with new knowledge they would gain from video screenings, which in turn formed the basis for additional boundary work (Qureshi et al., 2018). This additional boundary work involved intermediaries engaging in capability building, i.e., dissemination of knowledge, and

reformation of the social context to create inclusive markets in villages (Bhatt et al., 2022).

In developing and deploying strategies to overcome the challenges, intermediaries take into account the levels of inequality (caste-based disparities) and dependence (dependence of low castes on high castes to access resources). For instance, in a context where there was high inequality and high dependence, the intermediaries used "soft" and "prolonged" persuasion, where they engaged with "dominant" castes for years in farming-related activities, and only after this long engagement were the intermediaries able to persuade "dominant" castes to allow separate video screenings for the low castes (Bhatt et al., 2022: 945). Similarly, another study examined how community collectives engaged in prefigurative organizing to overcome entrenched inequalities by either leveraging "pre-existing cultural templates" or rejecting them to "reimagine inclusive futures" to alleviate external and internal marginalization. This was realized by encouraging more participatory decision-making processes in community collectives (without overtly challenging the elites) and engaging the community in constructive work first (e.g., using idle resources like unused land for soil erosion prevention) and, subsequently, moving toward more challenging work, such as creating water and seed bank commons (i.e., resources that "dominant" castes resist sharing with low caste groups) (Bhatt et al., 2024).

While the above studies focused on the deployment of strategies of social enterprises to disrupt dominant social orders, collective resistance and movements of low caste groups can also improve societal welfare, as some scholars have shed light on (Banerjee et al., 2022; Raman, 2020). For instance, Dalit women in tea plantations in Kerala "self-organized" and protested against their low wages, lack of representation in trade unions, and the "multiple burdens of value production – for instance on the worksite as workers, at home as a vehicle of social reproduction – among other unspecified forms of work" (Raman, 2020: 279). This protest resulted in the awarding of bonuses to these women as well as wage revisions. Perhaps

more importantly, it forced the plantation owners and the political elite of the state to engage with these women to address their concerns (Raman, 2020).

Summary of societal outcomes

In sum, research examining the implications of caste on societal outcomes has shown that caste dynamics present a challenge to societal welfare and hinder development work. To overcome these challenges, social enterprises employ strategies ranging from scaffolding to boundary work by considering the levels of inequality and interdependence in a context. Although such external entities play an important role in addressing caste inequalities, research has also shown instances where low caste individuals themselves self-organize and creatively overcome the obstacles posed by caste.

Influence of Caste Outside India

Scholars have recognized caste as a phenomenon that is restricted not only to India but is also relevant in South Asian countries, and its diaspora around the world who work in MNEs (Bapuji et al., 2023; Vaid, 2014; Yengde, 2023). In our review sample, ten empirical papers (seven qualitative and three quantitative papers) were set in contexts outside India. Specifically, four qualitative papers were set in Pakistan, where the *biraderi* system operates in ways that resemble the caste system, with high-caste *Zamindars* (landowners) and the low-caste *Kammis* (service providers, who converted to Islam from Hinduism) and *Chuhras* (Christian and Hindu Dalits, who are primarily in sanitation work) (Zulfiqar & Prasad, 2022). One paper referred to caste in Nepal (Sunam et al., 2022), and another referred to caste ties in India and Singapore (Velayutham & Wise, 2005). The remaining studies conducted comparative examinations of attitudes in India and those in Canada, the UK, and the U.S. Together, these papers have focused mainly on "dirty work", network benefits, and attitudes and beliefs influenced by caste.

Three of the four papers set in Pakistan examined cleaning and sanitation work, which revealed the concentration of Dalits and other low caste individuals in these jobs, as well as the

mechanisms we discussed in the section on occupational outcomes, such as racialization, stigmatization, and violence (Zulfiqar, 2019; Zulfiqar, 2022; Zulfiqar & Prasad, 2022). These studies recognize the intersectional nature of the challenges (i.e., caste, class, gender, and religion) faced by workers in menial occupations.

The other study set in Pakistan examined network benefits of caste, where the authors investigated the ethicality of *sifarish*, i.e., the use of network ties in hiring, as dictated by a person's *biraderi* as well as their class and religion (Nadeem & Kayani, 2019). Similar benefits were noted in other contexts as well, where caste ties allowed access to resources amongst migrant communities in the U.S. (Twine, 2022), and allowed a village to function as a moral economy through cultural practices, responsibilities, and affective structures shared among caste members in India and Singapore (Velayutham & Wise, 2005).

Three papers examined the effect of caste on attitudes and beliefs using cross-country samples. First, in an experimental study involving participants from India and the U.S., Blanchar and Eidelman (2013) found that there was greater justification for the caste system when it was presented as a longstanding system, but that it was defended more strongly by Indian participants (as compared to participants from the U.S.) because they perceived themselves as dependent on the system. Second, in a study of social evaluations, participants from India assessed high caste academics as credible, compared to those considered low caste, as similar to participants from the U.S. and Canada, who assessed men and White people as more credible. However, in contrast to participants with an egalitarian ideology from the U.S. and Canada, who assessed women and ethnic minorities as being more credible, Indian participants with egalitarian ideologies did not assess low caste academics as more credible than high caste academics (Zhu et al., 2016). Third, Combs and Nadkarni (2015) examined the differences in attitudes towards affirmative action among managers and found that Indian managers had less favorable views on affirmative action programs than managers from the

U.S., particularly for preferential treatment actions, such as quotas and reservations. Additionally, to counter attitudes against affirmative action and to challenge the dominant narrative that affirmative action compromises merit, one paper examining affirmative action in Nepal's public services argued that such policies may actually reward "competency" and promote organizational diversity and social equality and justice (Sunam et al., 2020).

In sum, as similar to research set in India, studies set in South Asian countries show the concentration of low caste individuals in menial occupations and the network benefits that caste affords to high caste individuals. However, studies examining attitudes and beliefs show intriguing variations across India and other countries, pointing to the potential new insights that can be gained by a more nuanced theorization of caste and how it influences outcomes. We discuss these and more such opportunities for future research in the next section.

POSITIONING MANAGEMENT RESEARCH TO GENERATE IMPACTFUL KNOWLEDGE ON CASTE

To position future management scholarship to make a greater impact on research and practice related to caste, we present research opportunities focused on manifestations of caste, outcomes of caste, addressing caste inequalities, and integrating caste into management research.

Manifestations of Caste

Building on research on caste that examined the impact of caste, future research can generate much-needed knowledge by studying the (in)visible manifestations of caste, institutional logics and practices that maintain caste, and micro-foundations of caste.

(In)visible manifestations of caste. Research has shown that caste manifests as organizational routines (D'Souza & Marti, 2022; Thomas, 2020). Adopting a practice-based approach, future research can draw on routine dynamics to generate insight as to how routines are enacted and stabilized as "normal and appropriate," which in turn "create and reproduce organizational and social consequences" (Feldman & Pentland, 2022: 848-849). For example, hiring practices like

giving importance to soft skills and presentability (Thorat & Newman, 2012), or segregated dining spaces for vegetarians and non-vegetarians (Thomas, 2020) can reflect invisible manifestations of caste, which reproduce and normalize caste inequalities.

Studying caste can provide insights into the relationality of routines i.e., how routines relate to other "actions, actors (including non-human actors), and patterns" (Feldman & Pentland, 2022: 854). For example, as similar to code switching used by racial minorities to "fit in" and make their White colleagues feel comfortable (Koch et al., 2001; Santiago et al., 2021: 74), and low social class individuals "learning elite cultural capital via mimicry" (Kish-Gephart et al., 2023: 520), individuals from low castes attempt to invisibilize their caste by changing last names or embracing vegetarianism to "pass" as those from high castes (Satyanarayana & Lee, 2023; Thorat & Newman, 2012). Future research can examine the practices that individuals from low castes adopt or conceal, the similarities and differences of these practices from those adopted by other marginalized groups, the resultant psychological toll faced by low caste individuals (e.g., due to "impostering" and fear of being "outed"), and the disadvantages faced by those who are unable to conceal their caste (e.g., similar to reduced employment opportunities, perceptions of incompetence, and lower wages faced by racial minorities who fail to code-switch, e.g., McCluney et al., 2021).

While individuals from low castes might wish to invisibilize their caste, high caste individuals may visibilize their caste via markers like last names, attire, rituals, or lifestyle to gain advantages (Thomas, 2020). At the same time, given the negative perceptions about the caste system, high caste individuals may also present themselves as "casteless" by rationalizing or normalizing such markers as cultural traditions or practices (Deshpande, 2013) that are needed for a "meritorious work culture" (Shakthi, 2023a:6). Therefore, it is important to examine how both visibilization and invisibilization might be performed in organizational contexts by high and low castes alike, for what purposes, in which settings, and in interactions

with whom.

Organizational efforts to address the implications of caste necessitate visibilizing caste, which can cause discomfort for both high and low castes, albeit for different reasons. A case in point is the resistance to caste being added in the U.S. as a protected category along the lines of gender, race, and religion (Khadgi, 2023). However, "caste blindness" may perpetuate inequalities and impede efforts to foster inclusive workplaces (Deshpande, 2013). Accordingly, future research could examine how processes of invisibilization and visibilization of caste can be negotiated to create inclusive organizations.

Practices and institutional logics that maintain the caste system. The caste system is maintained in organizational contexts through individual and organizational practices, such as food habits (Morris, 1965), recruitment practices (Soundararajan et al., 2023), and cultural programs (Thomas, 2020). Some organizational practices that reproduce inequalities also facilitate mobility, e.g., the formal dining ritual at Cambridge reproduces the British class system but also demystifies the elites, making them accessible to those from varied social backgrounds (Dacin et al., 2010). In this direction, it will be useful to examine whether organizational practices that are imbued with caste can also afford such opportunities, for example, by diluting caste connotations via participation from across the caste hierarchy.

In addition, practices and behaviors maintaining the caste system are shaped by different institutional logics (Thornton & Ocasio, 1999; 2008), through which caste inequalities can be reproduced. The logic of “meritocracy,” for one, can be used by elites (across caste, race, gender, and class) to defend their success and preponderance in particular occupations, professions, and positions in organizations (Gray & Kish-Gephart, 2013). For instance, low caste individuals face employment barriers in the name of merit, but the perceptions of merit are shaped by an individual’s identity, resources, networks, and culture – all of which are influenced by caste (Bapuji et al., 2024a). As a result, merit can become a proxy for caste

(Subramanian, 2015), and help to rationalize attitudes against affirmative action and perceptions about those who use them (Combs & Nadkarni, 2005; Prasad et al., 2020). Such logics, including those related to tradition, purity, and efficiency, can be studied to see how they legitimize inequalities and perpetuate unequal access to employment opportunities and hinder equitable career progression.

Micro-foundations of the caste system. The micro-foundations (Felin et al., 2015) of the caste system i.e., individual-level psychological, cognitive, and behavioral processes shaping caste-based attitudes, beliefs, and behaviors related to work and workplace, offer a promising avenue for future research. These micro-foundations may encompass cognitive processes like biases, stereotypes, or prejudices towards different castes and the emotions triggered by caste.

Scholars can utilize frameworks such as social identity theory (SIT) to understand discrimination and prejudice (Tajfel, 1979; Tajfel & Turner, 2004) through concepts of ingroup and outgroup bias. However, caste could also introduce complexity to SIT, due to the existence of various in-groups and out-groups at different hierarchical levels. For example, within a high and low caste group, there are different *jatis*, which are endogamous kinship and occupational communities. Further, caste groups and *jatis* are present across multiple religions, which can also serve as a basis for grouping. Investigating the in- and out-group dynamics within and between caste groups can help advance both research on caste and on social identity theory by exploring how multiple social identities, based on *jati* or religion or occupation, co-exist within the same caste. Furthermore, SIT can benefit from research exploring the loss of social identities, such as the misrecognition of Adivasi/ST groups due to them being combined with Dalits/SC and how categories like the "general category" anonymizes the caste identity of high castes and helps them invoke "castelessness" (Deshpande, 2013).

Scholars can build on research on stereotype threat, where an individual's negative stereotype makes them undermine their own achievements, to explore potential

underperformance among individuals from low castes (Hoyt & Murphy, 2016; Steele & Aronson, 1995). Working memory depletion, stress, and vigilance lead to underperformance due to stereotype threats (Schmader et al., 2008). Investigating these mechanisms within the caste and organizational context can reveal insights, such as the intergenerational internalization of impurity or inadequacy. Such examinations may shed light on why Dalit janitors experience dignity injuries, marked by the internalization of humiliation, exhaustion, and suffering produced by their work (Mahalingam et al., 2019).

Outcomes of Caste

Individual level outcomes. Building on research on individual level outcomes of caste that are related to differential employment opportunities, future studies can investigate the subsequent impact of these varied outcomes, for example, on the self-efficacy, psychological and physical well-being, and career development of individuals across caste groups. Specifically, research can help reduce undesirable individual level outcomes of caste by revealing the psychological impact of differential opportunities and rewards (e.g., hiring discrimination, income gaps) for individuals across caste groups, for example, in terms of stress and anxiety, which are common among lower-status groups (Haslam & Reicher, 2006), along with the mediating factors or mechanisms that generate these, e.g., microaggressions.

Researchers can also explore differences in subjective experiences of caste manifestations and generate new insights on topics like dignity. For example, “working class” individuals experience dignity through values inherent in their work i.e., “strong work ethic, provider orientation, dignity of all work, and workers and humility” (Lucas, 2011; Gibson et al., 2023: 235). These values can elevate individuals in the social class hierarchy (Gibson et al., 2023). However, such dignity is stripped from low caste individuals, who do not experience it at or in their work. More broadly, dignity and credibility afforded to individuals are contingent on caste. Therefore, incorporating caste-related ideas (e.g., inherent taint, purity of

food, Kikon, 2022) into examinations of dignity could enhance our understanding of the concept of dignity (Gibson et al., 2023). Additionally, examining the "credentialing" processes for specific castes, akin to the credentialing of "Whiteness" (Younkin & Kuppuswamy, 2018), can provide insights into the advantages available to these castes through such processes.

Occupation-level outcomes. Despite the presence of segregation as a broad pattern, how segregation and the concentration of a particular caste occur in a profession vary (Ranganathan, 2023). Accordingly, it will be useful to study how caste affects the founding, functioning, and evolution of occupations; as well as the change, adaptation, and innovations that occur within different occupations. Stigmatization of some types of labor (e.g., cleaning, crematorium work) as well as individuals (e.g., Dalits) stands out as an important mechanism at play in the concentration of low caste individuals in low-level jobs (Jagannathan et al., 2016). However, how some types of labor (e.g., intellectual or spiritual tasks) are valorized, and how individuals from high castes who undertake other types of labor i.e., ones that are inferior to their caste position, remain venerated remains relatively unaddressed. For instance, the adverse implications of "dirty work" that is performed by those of higher status e.g., exposure to "bodily effluence" during bodily care undertaken by doctors, are eclipsed by other aspects of these individuals' identity that afford them privilege (Slutskaya et al., 2016: 168). Examining such processes can identify whether, when, and how veneration travels with high caste individuals even when they pursue stigmatized occupations or undertake menial labor. Conversely, researchers can investigate how low caste individuals performing valorized labor cope with their caste stigma, negotiate their identities, and manage their work.

Organizational-level outcomes. Research recognizes caste similarity's positive effects on coordination and information sharing (Afridi et al., 2020), but the adverse effects of caste similarity (noted in the broader research on homophily, e.g., see Ertug et al., 2018; 2022) on these phenomena remain underexplored. Building on research that examined the outcomes of

homophily at multiple levels (e.g., individual, dyad, team, organizational, and macro/societal, Ertug et al., 2022), future research on caste can build a comprehensive understanding of how caste affects performance.

Addressing Caste Inequalities

Few studies have discussed organizational interventions to address caste inequalities, which is likely due to the fact that interventions to address caste inequalities were primarily limited to the Indian government and state-owned enterprises, with private enterprises actively resisting policy interventions by arguing that they compromise principles of merit and dent efficiency. In recent years, some MNEs have begun addressing caste by adding it as a protected category and including awareness of caste as part of employee orientation programs (Bapuji et al., 2023). The paucity of attention to addressing caste inequalities, coupled with the rich research on interventions to address gender and racial inequalities in organizations, makes this an area with abundant opportunities.

Organizational actions to address caste inequalities. As we have seen, scaffolding and boundary work have been used in the social sector to address caste inequalities (Mair et al., 2016; Qureshi et al., 2018). Future research can examine how these approaches could be transported to organizational contexts, so that inclusive climates can be developed (Meshram & Venkatraman, 2023). For example, researchers could explore the type of boundary work that needs to be performed in organizations and the resources needed to scaffold the same. Further, given the evidence about the effect of caste on hiring across organizational levels, it is necessary to study how organizations can eliminate hiring discrimination. For example, it is worth investigating whether organizational interventions to conceal caste names in assessments would make opportunities equitable for individuals, and how such anonymization can be effectively applied within the context of caste, given the existence of alternative means to ascertain an individual's caste, including cues like parents' name, occupation, or residential

address. Developing organizational interventions to address caste inequalities is particularly important because an individual's own practices, such as concealing racial cues on resumes, have been found to not reduce discrimination (Kang et al., 2016).

Research suggests that leaders need to adopt an inclusive mindset to champion diversity (Mitchell et al., 2015). As caste is not apparent from an individual's appearance, caste-related inclusion and exclusion may remain invisible (Bapuji et al., 2024b), posing challenges to inclusive leadership in organizations, i.e., leader behaviors that facilitate feelings of belongingness in employees while maintaining their uniqueness within the organization so that they can fully participate in processes and outcomes of an organization (Randel et al., 2018). Future studies could explore the types of resources and policies needed to provide inclusive leadership in organizations where caste plays a role. Given the low caste diversity within leadership roles, which influences the design of diversity interventions within organizations (Eagly & Chin, 2010), future research could examine how caste homogeneity and occupational concentration influence diversity interventions in organizations, and inclusive leadership more broadly.

We have a wealth of knowledge and insights from research and practice on gender, race, and ethnicity about addressing inequality in organizational settings. Research could delve into how these learnings can be effectively mobilized to develop and implement strategies to redress caste-based inequalities. For instance, in the case of diversity policies, one study suggests pacifying dominant or elite group members e.g., Whites, by including them in definitions of diversity (Phillips et al., 2022; Plaut et al., 2011). Future research can examine how diversity definitions can include caste, given the taboos and discomfort associated with even discussing caste.

While caste shapes the attitudes and behaviors of individuals, including in organizational contexts, based on the interview quotes in studies, some managers are not aware

of this or do not acknowledge it (e.g., the importance of merit and not caste, as noted in Hans & Vissa, 2023; Thorat & Newman, 2007). While such assertions might be better understood in the context of merit as an institutional logic in caste contexts, as we discussed above, it is necessary to study how caste can be addressed when high caste individuals deny its existence or resist, as evidenced in the U.S. (e.g., Google canceled a scheduled talk by an anti-caste advocate due to opposition from high caste individuals; some groups in the U.S. led by high caste individuals have opposed organizational and legislative efforts to address caste).

Integrating the caste system in management research and beyond

Caste is a complex phenomenon with manifestations and implications across levels. Therefore, researchers need to use methods that are suitable for this complexity. There is also a need to study caste-like systems across the globe and investigate the broader implications of caste for global issues, so that future research can keep pace with developments in the world. To this end, developing caste as a theoretical framework can provide insights into the workings of societal hierarchies and systemic discrimination, not just in South Asian societies but also in other parts of the world.

Qualitative methods. Qualitative research on caste has generated rich insights into manifestations of caste and its consequences to individuals, particularly low caste individuals. However, researchers who identified their positionality in the studies we reviewed have predominantly noted their high caste position, which can present challenges owing to inadequate awareness and understanding about caste oppressed communities. Therefore, management researchers can benefit from the further incorporation of approaches that can effectively access participants from caste-oppressed communities, authentically represent their voices, and mitigate risks of epistemic violence (Spivak, 1988). Methodological approaches, like community-based participatory research, critical ethnography, and decolonizing approaches like storytelling, may prove useful to capture the complexity and diversity of voices

within oppressed communities and avoid essentializing their experiences. At the same time, approaches like self-reflexivity and consciousness raising (Zulfiqar & Prasad, 2021), as well as epistemic humility (Singhal et al., 2023), may be required to study caste among high caste groups and engage them in the reflection of their own "epistemic comfort" and "systematic ignorance" in the reinforcement of caste inequalities (Sholock, 2012). Overall, these would require researchers to allocate sufficient time to understand and interact with the community and undertake necessary training (e.g., on mental health) to address the emotions and potential traumas that might be evoked by delving into the caste-based discrimination experienced by low caste individuals and the feelings of guilt faced by high caste individuals.

Most research that adopted qualitative methods, particularly those accessing low caste participants, were not transparent about how power imbalances between the researcher and participants were navigated. The lack of consideration and acknowledgment of the researcher's caste position can impede the authentic generation and interpretation of responses (Rose, 1997; Smith, 1999). Therefore, there is a need to better understand how researcher positionality (e.g., caste, gender, race, along with intersectional aspects) affects the collection, analysis, and interpretation of data. Future research can also examine the ways in which power imbalance can be mitigated through reflexive practice and dialogical approaches.

Quantitative methods. Research in proximate disciplines has benefited from large-scale surveys, such as the India Human Development Survey and those conducted by the National Sample Survey Office in India. Although such surveys are not focused on businesses, management researchers have leveraged them to generate useful insights (e.g., Audretsch et al., 2013; Sarkar et al., 2018). Nevertheless, the paucity of large-scale datasets that include caste makes research on the topic challenging. Future research could develop new survey instruments or adapt existing ones (e.g., World Values Survey, Global Entrepreneurship Monitor) to capture the manifestations of caste that are relevant to management and

organizational contexts, e.g., openness to pursue occupations seen as low caste and social interactions with those placed high or low in the caste hierarchy.

The nature of caste also poses methodological challenges that need to be taken into account to conduct robust empirical analyses. For example, the results of analyses can be affected by whether caste is treated as a nominal or ordinal variable. Accordingly, studies could examine whether such decisions influence the magnitude and direction of associations between caste and outcomes. Given the broad range of ways in which caste influences outcomes, another key challenge is disentangling the causal effects of caste from factors that may be associated with it, e.g., education, occupation, and social capital.

Caste-like systems around the world and implications for global concerns. Caste and caste-like systems of social stratification exist around the world. For example, the Burakumin in Japan, who are associated with "unclean" professions such as butchery and leatherworking, have historically been discriminated against (Wagatsuma, 1967). Future research could explore how these systems are similar to or different from each other in terms of their historical and cultural contexts, their social implications, and their manifestations in workplaces.

With the global movement of people and cultures, the transfer of caste systems to non-caste contexts, such as Saudi Arabia, the U.S., and the UK, has become a subject of increasing interest (Yengde, 2022). Future research could examine how caste systems transfer to such non-caste contexts and what shape this transfer takes in organizations. In some of these contexts, caste might also interact with other forms of marginalization, such as race and ethnicity, which research could examine to see how such intersections differently shape the various outcomes of caste across different levels.

Like other systems of inequality, caste has implications for global issues like social and environmental sustainability (Mosse, 2018). Accordingly, researchers can investigate if and how caste-based inequalities hinder the achievement of sustainable development goals (SDGs),

such as those related to poverty eradication, quality education, gender equality, and reduced inequalities, and what strategies or measures can be adopted to address these SDGs.

Caste as a theoretical lens. The development and application of a "caste lens" can provide a promising future research agenda for topics on inequality (Bapuji & Chrispal, 2020). By caste lens, we refer to an analytical framework that incorporates the manifestations of caste and its associated assumptions and functions in understanding social phenomena. Empirical studies have shown that hypotheses that are derived from theoretical premises that are applicable to other types of social stratification (e.g., ethnicity, gender) do not necessarily hold in the context of caste (e.g., Deshpande & Spears, 2016; Zhu et al., 2016). Additionally, there is recent interest in using caste as a lens to understand other systems of inequality, such as race (Wilkerson, 2020), and how systems of inequality shape modern organizational structures and practices (Ray, 2019). Given these developments, it might be generative to move from treating caste as "only" a social phenomenon to developing caste as a theoretical lens, which can also advance our understanding of other types of inequality. For example, research that delves deeper into the idea of a graded hierarchy could yield insights that can also be applied to study ethnicity-based discrimination in organizations in Western societies, such as how and why individuals from various ethnic backgrounds occupy positions of power across a spectrum, and face different kinds and levels of discrimination.

Conclusion

The caste system plays a key role in shaping the attitudes and behaviors of individuals in social and economic settings, affecting the lives of nearly two billion people in South Asia and subjecting nearly 400 million of those people to severe social, economic, cultural, and political disadvantages. Further, caste has theoretical significance – as a phenomenon that influences a range of management topics and as a lens that can explain how systems of inequality function, shaping individuals and collectives. Management research can play a

significant role in addressing caste inequalities by drawing on its wealth of knowledge about how inequalities manifest and operate to shape individual, occupational, organizational, and societal outcomes. Putting ourselves in a position to play such a role is in line with the efforts of management scholars to make a positive difference by creating inclusive organizations and societies.

To help management scholars to take that leap, we provided a review of the research on caste to clarify how caste manifests and influences a range of outcomes, enabled by a plethora of mechanisms. We hope that our effort makes our colleagues pause and reflect about the insidious nature of caste inequalities and imagine a world where people are not treated as subhuman on account of their birth, and where human potential is not constrained by artificial social constructs. Such reflection can pave the way for a more impactful scholarship that enriches the lives of those who carry the brunt of intergenerational oppression and continue to face it in their generation.

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Figure 1: Manifestations of caste and the mechanisms through which they influence outcomes

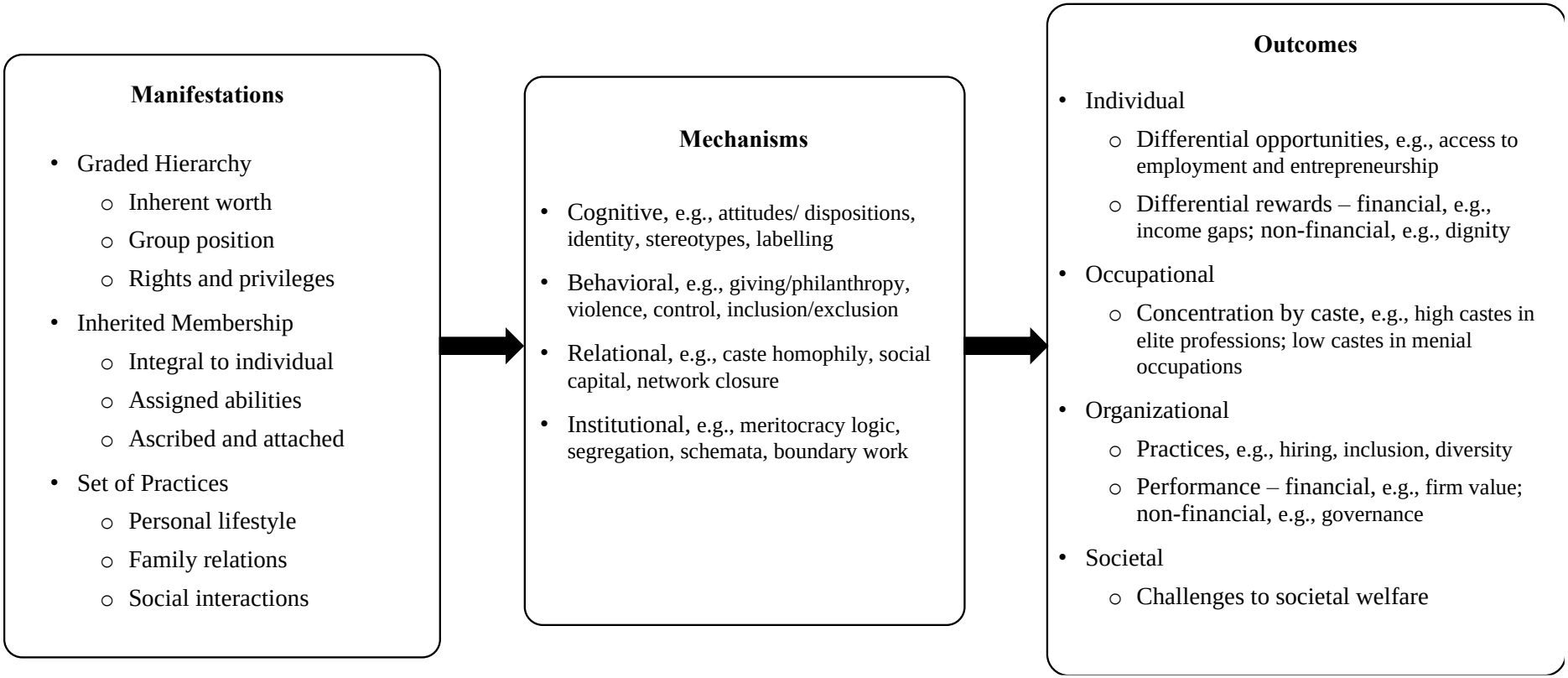

Table 1: Definitions of Caste – Content Analysis

Paper	Definition/Description	Manifestations Noted/ Inferred
Bhatt, 2020	"Caste is a system of **graded social inequality** consisting of four broad Varna categories that are arranged in **a rough hierarchy** and **divides society into four main** groups…" p. 747	• Graded hierarchy (groups, inequality)
Haq, 2012	"Caste, or jati in Sanskrit, is determined upon the **birth** of a child based on **perceptions of purity and pollution of the family profession**, which is generally **identified through the family name** and remains **unaltered over the generations**." p. 897	• Graded hierarchy (unaltered, family profession, purity/pollution) • Inherited membership (by birth, name)
Jagadale et al., 2018	"The caste system is a complex societal stratification institution that is based on the **division of people into distinct hereditary groups** i.e., castes. The system reinforces a **'hierarchy'** of castes which are distinctively a) **separated from each other** in various milieus, e.g., marriage, contact, food consumption; b) **divided in terms of labor**, and c) **ranked in terms of superiority and inferiority** (Dumont, 1970)." p. 3	• Graded hierarchy (superiority/inferiority) • Inherited membership (group, division of labor) • Set of practices (marriage, contact, food consumption)
Mahadevan, 2015	"Caste refers to the **shared belief of belonging to a distinct social in-group** (and not belonging to other jatis, i.e., social out-groups). Based on Dumont's (1980) seminal work, caste interrelations are based on three main structuring principles, namely **hierarchy, separation, and interdependency**." p. 372	• Graded hierarchy (division, interdependency, separation) • Inherited membership (in-group/out-group)
Mair et al., 2016	The caste system … "involves **a set of norms, rules, and beliefs** that underpin **categories of exclusion and reify social divisions** (Beteille, 1965; Dumont, 1980). These rules and norms govern **social practices** in **distinct spheres of social life**: political, economic, and religious (Mair, Marti, & Ventresca, 2012)." p. 2021-22	• Hierarchy (reify social divisions) • Inherited membership (category, exclusion) • Set of practices (social practices)
Mendonca et al., 2022	"Caste or varna (meaning color or category) is the **religiously sanctioned segregation** and **ordering of traditional occupations** structured around the **notions of purity and pollution** (Jodhka, 2016; Judge, 2012)." p. 5	• Graded hierarchy (purity/pollution) • Inherited membership (occupation) • Set of practices (segregation)

Paper	Definition/Description	Manifestations Noted/ Inferred
Prasad et al., 2020	"Caste represents a **hereditary** social **hierarchy** not rooted in ethnic or racial differences, but rather in an intricate system of **purity** based on one's **traditional occupations** and **religious sanctions**. The caste system categorizes individuals into a **hierarchy that determines one's status in society, occupation, matrimony** (since caste is endogamous) and **access to resources**." p. 599	• Graded hierarchy (differential rights, resources, religious sanctions, status) • Inherited membership (inherited, traditional occupations) • Set of practices (matrimony)
Qureshi et al., 2023	"The caste system is a **hierarchical** form of **social organization** with far-reaching social and economic consequences (Srinivas, 1996; Thorat et al., 2009)." p.3	• Graded hierarchy (social organization)
Sidhu & West (2014)	"India's traditional caste system endows it with a **status hierarchy** that has no direct counterpart in western society." p. 116; "A caste may be defined as 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**. The name generally denotes or is associated with a specific **occupation**." p. 118	• Graded hierarchy (status) • Inherited membership (social category – collection of families or groups bearing a common name, homogenous community, descent, occupation)
Vijay & Nair, 2022	"Caste, sometimes referred to as *varna* or *jati*, is a form of social **stratification** based on **hereditary membership, endogamy, hierarchy**, and **difference enacted in purity and pollution rituals** (Vaid, 2014)" p. 319	• Graded hierarchy (stratification, position) • Inherited membership • Social practices (endogamy, enacted in 'purity/pollution rituals')
Vissa, 2011	"The caste system is defined as a **status hierarchy of endogamous groups** that individuals enter only by **birth** (Olcott, 1944; Srinivas, 2002)" p. 141	• Graded hierarchy (status) • Inherited membership (birth) • Set of practices (endogamy)
Zulfiqar & Prasad, 2022	"The caste system on the Indian subcontinent is a **powerful, socially stratifying institution** that intersects with class, culture, ethnicity, religion, and language in complex ways, ultimately culminating in **inter-generational social stigmatization** (Chrispal et al., 2021)." (p.7)	• Graded hierarchy (social stratification) • Inherited membership (intergenerational) • Set of practices (culture, religion, language)

Table 2: Cognitive, Behavioral, Relational, and Institutional Mechanisms of Caste

Mechanism category	Mechanism type	Representative scholarship
Cognitive (accounting for 20% of the mechanisms discussed by the reviewed empirical studies; in terms of the breakdown, these account for 20% of the mechanisms discussed in quantitative studies and 20% of the mechanisms discussed in qualitative studies)		
Embodiment	Attitudes and dispositions	Combs & Nadkarni, 2005; Dasgupta et al., 2023; Srinivasan et al., 2016
	Internalization of caste-based preferences and acceptance of caste identity	Mahadevan, 2015; Shepherd et al., 2022
	Identity work e.g., meaning-making, construction of inauthentic or alternative identities	Jagadale et al., 2018; Mendonca et al., 2022; Shepherd et al., 2022
Categorization	Caste stereotypes	Jodhka & Newman, 2007; Zhu et al., 2016
	Castelessness (i.e., invisibilizing caste, savarna gaze)	Banerjee et al., 2022; Deshpande, 2013; Shakthi, 2023a
Racialization	Inherent taint of low castes	Gupta, 2022; Mahalingam et al., 2019; Mahalingam & Selvaraj, 2022
	Responsibilization of low castes (i.e., caste-based obligations)	Gupta, 2022; Jagannathan et al., 2016
	Dehumanization through labelling e.g., foreign, dirty, scavengers or sweepers	Mahalingam et al., 2019; Mahalingam & Selvaraj, 2022; Zulfiqar, 2019
	Humiliation	Varman et al., 2023
Behavioral (accounting for 34% of the mechanisms discussed by the reviewed empirical studies; in terms of the breakdown, these account for 29% of the mechanisms discussed in quantitative studies and 38% of the mechanisms discussed in qualitative studies)		
Conduct	Essentialization of identity (e.g., in terms of lifestyle, diet)	Mahalingam, 2003; Fernandez, 2018; Jeffrey, 2001; Thomas, 2020
	Show of reverence toward high caste, fear of retaliation	Mahalingam et al., 2019; Qureshi et al., 2022
	Giving and philanthropy	Deshpande & Spears, 2016; Hans & Vissa, 2023

Mechanism category	Mechanism type	Representative scholarship
Interactions	Division (e.g., creation of boundaries between castes to maintain purity)	Murthy & Rooney, 2018; Thomas, 2020
	Violence (e.g., physical, ethical, epistemic, symbolic, and material)	Vijay & Nair, 2022; Varman et al., 2023; Zulfiqar, 2019
	Exclusion (e.g., exclusion from social, political, and economic life)	Bhatt, 2022; Qureshi et al., 2022
	Control (e.g., control over positions of power and resources; interpretive control)	Mair et al., 2016; Murthy & Rooney, 2018; Sutter et al., 2023
	Discrimination e.g., taste/statistical discrimination based on caste	Madheswaran & Attewell, 2007; Thorat & Attewell, 2007; Thorat & Newman, 2007
Relational (accounting for 16% of the mechanisms discussed by the reviewed empirical studies; in terms of the breakdown, these account for 15% of the mechanisms discussed in quantitative studies and 16% of the mechanisms discussed in qualitative studies)		
Affinity	Homophily/Social similarity	Chen et al., 2015; Damaraju & Makhija, 2018; Vissa, 2011
	Cultural/caste affiliation	Fisman et al., 2017
Networking	Formation of occupational networks based on caste	Murthy & Paul, 2019; Nadeem, 2019
	Network closure by high and dominant castes	Bhardwaj et al., 2021; Iversen & Raghvendra, 2006
	Network gaze (i.e., policing)	Velayutham & Wise, 2005
Institutional (accounting for 27% of the mechanisms discussed by the reviewed empirical studies; in terms of the breakdown, these account for 29% of the mechanisms discussed in quantitative studies and 25% of the mechanisms discussed in qualitative studies)		
Maintenance	Meritocracy logic (i.e., beliefs about intrinsic merit)	Deshpande & Newman, 2007; Jodhka & Newman, 2007; 2023a; 2023b; Vijay & Nair, 2022
Change	Strategies e.g., scaffolding, value work, boundary work,	Bhatt, 2022; Bhatt et al., 2022; 2024; Chatterjee et al., 2021; Mair et al., 2016;

Mechanism category	Mechanism type	Representative scholarship
	knowledge commoning, prefigurative organizing	Qureshi et al., 2018; 2022; 2023
	Resistance through social movements e.g., self-organizing, protests, grassroot movements	Banerjee et al., 2022; Raman, 2020

Table 3: Individual, Organizational, Occupational, Societal Outcomes of Caste

Outcome category	Outcome type	Representative scholarship
Individual (accounting for 42% of the outcomes examined by the reviewed empirical studies; in terms of the breakdown, these account for 54% of the outcomes examined in quantitative studies and 33% of the outcomes examined in qualitative studies)		
Differential Opportunities	Access to employment	Banerjee et al., 2009; Thorat & Attewell, 2007
	Access to entrepreneurship	Audretsch et al., 2013; Sarkar et al., 2018; Soundararajan et al., 2023
Differential Rewards	Financial rewards e.g., income gaps	Hnatkovska et al., 2012; Gupta, 2022; Madheswaran & Attewell, 2007;
	Non-financial Rewards e.g., credibility and dignity	Jagadale et al., 2018; Mahalingam et al., 2019; Mahalingam & Selvaraj, 2022; Zhu et al., 2016
Occupational (accounting for 16% of the outcomes examined by the reviewed empirical studies; in terms of the breakdown, these account for 5% of the outcomes examined in quantitative studies and 24% of the outcomes examined in qualitative studies)		
Concentration	High castes in elite professions	Dayanandan et al., 2019; Murthy & Rooney, 2018; Shakthi 2023a; 2023b; Sian & Verma, 2021; Sidhu & West, 2014
	Low castes in menial professions	Gupta, 2022; Jagannathan et al., 2016; Mahalingam et al., 2019; Mahalingam & Selvaraj, 2022; Mendonca et al., 2022; Shepherd et al., 2022; Varman et al., 2023; Zulfiqar & Prasad, 2021; Zulfiqar, 2019
Organizational (accounting for 27% of the outcomes examined by the reviewed empirical studies; in terms of the breakdown, these account for 36% of the outcomes examined in quantitative studies and 19% of the outcomes examined in qualitative studies)		
Practices	Hiring	Bhattacharya et al., 2022; Damaraju & Makhija, 2018; Jodhka & Newman, 2007; Saha, 2012; Siddique, 2011
	Inclusion	Fernandez, 2018; Thomas, 2020
	Diversity	Bhagavatula et al., 2023; Dayanandan et al., 2012; 2019; Garg et al., 2023
Performance	Financial performance	Anderson, 2011; Bhagavatula et al., 2023; Claes & Vissa, 2020; Deshpande

Outcome category	Outcome type	Representative scholarship
		& Sharma, 2016; Jain & Abraham, 2023; Munshi, 2011
	Non-financial performance	Afridi et al., 2020; Bhavnani & Lee, 2021; Chen et al., 2015; Chakraborty et al., 2023; Dayanandan et al., 2020; Hoff & Pandey, 2014
Societal (accounting for 16% of the outcomes examined by the reviewed empirical studies; in terms of the breakdown, these account for 4% of the outcomes examined in quantitative studies and 24% of the outcomes examined in qualitative studies)		
Societal welfare	Challenges and responses of social enterprises	Banerjee, et al., 2022; Bhatt, 2022; Bhatt et al., 2022; 2024; Chatterjee et al., 2021, 2022; Mair et al., 2016; Qureshi et al., 2018; 2022; 2023; Raman, 2020

Table 4: Agenda for Future Management Research on Caste

Future Research Topics	Indicative Research Questions
Manifestations of Caste	
(In)visible manifestations of caste system	○ What are practices that low castes adopt to conceal their caste, how are these different or similar to those adopted by other marginalized groups? What are the psychological tolls that result from this and what are the disadvantages to those who are unable to conceal their caste? ○ How are the manifestations of caste visibilized (e.g., via last names or lifestyle) and invisibilized (e.g., framed as tied to culture, tradition, or freedom of choice)? What are the implications of such (in)visibilization?
Institutional logics and practices that maintain caste and its manifestations	○ What organizational practices or tasks imbued with caste can provide opportunities to those from low castes to participate with castes across the hierarchy? ○ What institutional logics (e.g., meritocracy, tradition, purity and efficiency) are used to maintain caste dynamics in various settings (e.g., social and professional interactions) and at various levels (e.g., individual, organizational, institutional)?
Micro-foundations of caste and its manifestations	○ What are the micro-foundations of caste (e.g., individual characteristics, and organizational routines) that manifest in organizational settings? ○ What theoretical perspectives (e.g., social identity theory, stereotype threat) can be used to examine the micro-foundations of caste?
Outcomes of Caste	
Individual-level outcomes	○ How does caste affect individuals in organizations (e.g., stress, anxiety) across the caste spectrum and via what mechanisms (e.g., microaggressions)? ○ How does caste enhance our understanding of dignity? ○ What are the credentialing processes for specific castes?
Organizational-level outcomes	○ How does caste affect team interactions, interpersonal dynamics and communication within teams?
Occupational-level outcomes	○ How do caste-based traditions, beliefs and ideologies influence evolution of occupations and adoption of innovation within them? ○ How are some occupations valorized, and how do individuals from high castes who take up labor that are beneath/out of their caste position remain venerated? ○ How do low castes in valorized occupations manage their identities and perform?

Future Research Topics	Indicative Research Questions
Addressing Caste Inequalities	
Organizational actions to address caste inequalities	○ How can approaches like scaffolding and boundary work be transported to organizational contexts? ○ How can organizations mitigate hiring discrimination e.g., anonymization of caste names? ○ What are the types of resources and policies needed to enable inclusive leadership in organizations?
Managing resistance to address caste inequalities	○ What forms does resistance to caste remediations take? How can organizations navigate such resistance?
Integrating Caste into Management Research and Beyond	
Qualitative methods	○ What methodological approaches are appropriate to access participants from caste-oppressed groups, and be authentic to, and faithfully represent, their voices? ○ How does researcher positionality affect the collection, analysis, and interpretation of data on caste? How can those effects be managed?
Quantitative methods	○ How can the various manifestations of caste be captured in quantitative data (e.g., via newly developed surveys)? ○ What methodological choices are appropriate for analyzing the effect of caste (e.g., treatment of certain caste categories as nominal or ordinal variables)? ○ What endogeneity issues are pertinent in studying the outcomes of caste (given the broad range of multi-level and multi-dimensional mechanisms that caste engenders)?
Caste-like systems around the world and implications for global concerns	○ What caste and caste-like systems exist in South Asia (e.g., Pakistan – *Biraderi*) and around the world (e.g., Japan – *Burakumin*)? What are the commonalities and differences across these, and how do they manifest in workplaces? How do these intersect with other forms of marginalization e.g., race, ethnicity? And, how these intersections shape various outcomes of caste across various levels? ○ How is caste related to global concerns, such as SDGs and grand challenges?
Caste as a theoretical lens	○ What are the assumptions of a caste lens (e.g., fixed hierarchy, racial superiority)? What are its functions (e.g., what social and organizational phenomena can a caste lens explain)? ○ How is a caste lens similar to or different from lenses that relate to gender, race, and class?

Appendix 1

Search, Screening and Coding

We used a multi-stage process to finalize the list of works in this review and analyze their content.

Database Search

This stage involved four steps: i) selection of search terms, ii) choosing database and search type, iii) identifying disciplinary categories to search, and iv) searching the database.

First, based on our own research and engagement with the topic studies we were already familiar with, we identified a set of words that would capture articles on caste. These terms include those that represent:

(i) *the caste system*, e.g., caste, baradari/biraderi, and community/communities
(ii) *caste groups*, e.g., brahmin, vysyas, SC, ST, Dalit, Ashraf, Azlaf, and Shudra
(iii) *specific castes*, e.g., bania, chamar, mahar, kasai, kamma, reddy.

Developing a large set of search words (including spelling variants) was necessary because scholars have not used a standard set of terms in studying caste. Therefore, a narrower search would not have captured some of the relevant papers. For example, by including 'community', we identified relevant papers (Mani, 2021; Mani & Durand, 2019) that we would not have identified by searching for "caste" alone as these papers did not have caste in their titles, abstracts, or keywords.

Second, we selected the Web of Science (WoS) database to conduct a search for papers. Specifically, we conducted a topic search (TS), which scans the title, abstract, and keywords of a paper for the search terms identified.

Third, we included the following WoS categories for our search: business and management, economics, sociology, development studies, public administration, and psychology. We included non-management categories because a longer and rich tradition of scholarship on caste exists in these related social science disciplines. Some of the work in those disciplines has been set in organizational contexts or has focused on phenomena commonly studied by management scholars. Identifying and leveraging such pertinent scholarship in proximate disciplines can provide valuable insights for management researchers and reduce duplication of efforts.

Fourth, we ran the search in WoS based on the above choices, identifying 3,411 records after retaining only English language works and those classified as article, editorial material, and review. Of these records, 603 were from Business and Management categories, with the rest (i.e., 2808) coming from proximate disciplines.

Screening and Additional Search

Screening

One of the co-authors read through the titles and abstracts of all 3,411 records retrieved by the database search, deciding to include 166 articles and exclude 3,245 records that did not focus

on caste or did not have content relevant to management research:

- *Screening the records for whether the content is substantively related to caste*. We excluded articles that were retrieved due to one of the search terms appearing in their title, abstract, or keywords but where the content did not focus on caste. For example, one of the keywords we used, OBC (to refer to Other Backward Classes), resulted in works that used OBC to refer to other entities (e.g., online brand communities or Oriental Bank of Commerce). Also excluded were many papers that used tribe or tribal (included in our keywords in the search query) to refer to consumer tribes, large number of people (tribe) or tribal communities outside South Asia, having no relevance to caste. Similarly, we excluded works that had, for example, SC (for structural capital) and ST (strategic thinking) which were retrieved because of a match with our search terms SC (for scheduled castes) and ST (scheduled tribes). In some cases, articles used caste in the title or abstract but neither examined caste nor collected data from contexts where caste is present. For example, one article (Lenski, G. E., & Leggett, J. C. (1960). Caste, class, and deference in the research interview. *American Journal of Sociology*, 65(5), 463-467) used caste and class synonymously, and collected survey data from respondents in Michigan, U.S. For our purposes, this study, examining biases in interviews, was not related to caste.
- *Screening the records for relevance to management research*. We excluded records if they did not study caste in an organizational context, as was the case, for example, in (Tripathi, V. R., Popli, M., & Gaur, A. 2022. Spirituality meets science: Impact of founders' imprint on healthcare practices for marginal communities in India. *Journal of Business Research*, 138: 311–323). We also excluded articles if they did not study topics or relationships that are commonly studied by management scholars. For example, we excluded (Borooah, V. K. 2022. Development, Sanitation and Personal Hygiene in India. *The European Journal of Development Research*, 34(1): 103–123.)

One of the authors performed the above steps. Another author examined the inclusion/exclusion decisions and reviewed the records which were marked for further review, i.e., those about which a clear in/out call was not made by the initial screener.

Additional search

We took several additional steps to ensure that we do not exclude influential works and recent works from our review.

First, we went through 208 articles (within the full set of 3,411) that had 50 or more citations. Two authors examined these works following the same criteria as above. Among these 208 articles, 30 articles (14%) were previously coded for inclusion, while 123 (59%) were excluded due to their content not being related to caste and 55 (26%) were excluded for not being relevant to management research. In other words, this step served as a quality check and did not yield any additional papers.

Second, we conducted a topic search for "caste" in WOS across all categories, i.e., beyond the categories we identified as relevant, recorded in Step 3 of Database search sub-section in this appendix. From this search, we downloaded 500 works that were most-cited and screened them by reading title, abstract, and full text where necessary. This process yielded seven additional

articles (17 others were identified in previous steps and already included in our review set). The remaining were not relevant. For example, we excluded a large number of articles because "caste" is also used in science disciplines to refer to caste colonies among bees, ants, and wasps, among others, that differentiate workers with distinct roles from queens.

Third, to ensure that we do not miss relevant articles that have not yet been indexed in WOS or those that study caste, even though they do not use any of the terms in our list in their title, abstract, or keywords, we conducted a search in the full-text of the FT-50 journals by using the 'search in this journal' feature on each journal's website to capture articles that may have used caste-related terms in their full-text. In this search we used the same query as the one we used to search WoS. This step helped us to identify an additional 27 papers that did not use caste-related terms in their title, abstract, or keywords but might nevertheless have focused on caste. An example of a paper we identified in this step is: Mair, J., Wolf, M., & Seelos, C. 2016. Scaffolding: A process of transforming patterns of inequality in small-scale societies. *Academy of Management Journal*, 59(6): 2021–2044.

In addition, to identify papers that may be missed in WoS searches, we had also subscribed to Google Scholar Alerts for "caste" at the beginning of our search process, which helped us find five new papers (published in 2022 and 2023) not indexed in WoS.

Finally, we conducted a backward citation search in the 205 articles included so far to identify relevant works, following the same criteria as the above (i.e., in Step 1). This step helped us identify an additional 54 influential papers, some of which are published in journals that are not part of the WoS database, e.g., *Economic & Political Weekly*, a publication from India that is reputed for publishing rigorous research. The backward citation search also allowed us to identify 31 scholarly books and 12 research reports published by stakeholders, such as United Nations, World Bank, and OECD Watch.

In a last step, two authors examined each shortlisted work up until that stage and selected for inclusion in our final review sample those that presented a study of caste in an organizational context (e.g., corporates or NGOs) or topics that are commonly studied by management scholars (e.g., hiring discrimination).

Altogether, we identified 259 articles, 31 books, and 12 research reports as relevant for further consideration.

Coding

We coded each of the 259 articles selected for basic aspects, such as: journal quality (e.g., whether included in FT-50, ranked at the top in ABS or ABDC lists); article type (conceptual, quantitative, qualitative, review); disciplinary domain (business and management or neighbouring); focus on caste (core, supportive, peripheral); whether defined/clarified caste; empirical context (inductively coded); religious context (inductively coded); for quantitative papers, (i) category of hypotheses (formally stated; conjectures stated based on prior literature; none), (ii) data source (Archival, Experiment, General Survey by government or non-government agencies, survey by researchers), (iii) level of analysis (individual, occupational, organizational, societal), (iv) consideration of social class (controlled by design, controlled using variables, not clear, not relevant to the study), (v) whether the setting is rural, urban, or both.

After this step, we excluded 43 articles whose focus on caste was peripheral and retained only those articles where caste formed a core element of the study (152 articles, or 70%) or supportive element (64 articles, or 30%). This left us with 216 articles, which formed the main basis for our review, while the 31 books and 12 reports informed our review and analysis.

Coding for outcomes and mechanisms

Mechanisms. We coded quantitative empirical articles for mechanisms as follows: 1 – Mechanisms theorized (e.g., in hypotheses development section) and directly tested (e.g., via mediation or moderation); 2 – Mechanisms theorized in hypotheses but not tested (e.g., homophily arguments are invoked in hypotheses development but homophily is captured via caste similarity as a proxy); 3 – No hypotheses, but mechanisms explained/speculated either before data analysis (e.g., in theoretical background or literature review section) or post-hoc (e.g., articles that show relationships and speculate the possible reasons for the relationship); 4 – No mechanisms discussed, e.g., the study presented only correlational analysis and did not delve into mechanisms in its theorizing either.

We coded qualitative empirical articles for mechanisms as follows: 1 – Mechanisms theorized (e.g., in the theoretical background section), evidenced (e.g., discussed in findings), and articulated (e.g., in discussion section); 2 – Mechanisms evidenced and articulated; 3 Mechanisms articulated. 4 – No mechanism discussed.

In addition to the degree to which the mechanisms were articulated and documented or empirically investigated in studies, we also categorized the coded (finer-grained and more detailed) mechanisms into cognitive, behavioral, relational, and institutional, as presented in our framework in Figure 1.

Outcomes. We coded each empirical article for the outcomes they studied and categorized this more detailed/finer-grained information into outcomes at the individual (differential opportunities, differential rewards), occupational (concentration by caste), organizational (practices, performance – financial; non-financial), and societal (challenges to societal welfare) level. If an outcome was studied in a quantitative article that did not pertain to any of these categories, but instead was more proximally/directly a mechanism itself (e.g., beliefs about social class, system justification), we coded them correspondingly as mechanisms (which happened for 12 articles) and used that information accordingly in developing our narrative.

Appendix 2

Table: Related Reviews and Differences from our Review

Paper	Key findings/insights	Differences from our review
Raheja, G. G., 1988 India: Caste, Kingship, and Dominance Reconsidered. *Annual Review of Anthropology*.	• Summarizes the works of scholars who critique the Dumontian view of caste and offers a nuanced understanding of the relationship between caste and king (or dominant caste).	• *Audience* – Anthropology scholars. • *Focus* – Narrow; how to understand caste. • *Concern* – Highlight the need to understand caste from a secular lens rather than a religious lens. • *Literature covered* – Limited (anthropology and sociology). • *Overlap*: 2 (0 papers + 2 books + 0 reports) out of 259 works we review.
Gupta, D., 2005 Caste and politics: Identity over the system. *Annual Review of Anthropology*	• Discusses caste in the context of political developments in India. Argues that caste as a hierarchy is weakening while caste identities are strengthening. • Outlines the political ascendance of peasant castes across many parts of India and the downfall of elite castes in politics in those parts. Also, discusses the political changes in the form of constitution, land reform etc., that diluted the power of dominant castes. Further, traces the emergence of Dalit politics and politics within the Dalit community. • Discusses the i) relationship between caste and political alliances, ii) emergence and politics of reservations	• *Audience* – Anthropology scholars. • *Focus* – Narrow; how to understand caste and its evolution in politics/society. • *Concern* – Emphasize the dynamic nature of caste hierarchy and strengthening of caste identities. • *Literature covered* – Limited (sociology and political science) • *Overlap*: 5 (0 papers + 5 books + 0 reports) out of 259 works we review.
Vaid, D., 2014 Caste in contemporary India: Flexibility and persistence.	• Criticizes the orientalist and essentialist (e.g., Dumont) view of caste as rigid and unchanging and highlights the flexibility or fluidity of caste in the socio-economic, occupational, and labor market domains. • Social mobility occurred through occupational mobility, which was greater for middle castes. Dalits experienced social mobility, but	• *Audience* – Sociology scholars. • *Focus* – Broad; how to understand caste, the effect of caste on socioeconomic mobility, prevalence, and persistence of caste. • *Concern* – Emphasize the socioeconomic or labor market dimension of caste and its transformations

Paper	Key findings/insights	Differences from our review
Annual Review of Sociology	their occupational mobility was limited due to labor market discrimination. • Associating caste only with Hinduism/India is incorrect, given its prevalence in other religions and countries in South Asia, and among the Indian diaspora in the UK.	• *Literature covered* – Wide-ranging (e.g., anthropology, economics, and sociology, but not management). • *Overlap*: 21 (13 papers + 8 books + 0 reports) out of 259 works we review.
Mosse, D., 2018 Caste and development: Contemporary perspectives on a structure of discrimination and advantage. *World Development*	• Labor market opportunities and outcomes are structured via *occupational rankings* (or caste-typing of jobs), *network effects* (hiring through caste-kin networks), and *categorical exclusion* of specific groups. Consequently, Dalits earn less than equally qualified members of other castes. • Similar to the above, the success of Dalit entrepreneurs is hindered by *market ranking* (i.e., the concentration of castes along value chain activities based on caste hierarchy), *network effects*, and *exclusion* from access to resources and opportunities. • Emphasizes the need to study caste as rank, networks, and identity.	• *Audience* – Scholars in development studies. • *Focus* – Broad; effect of caste on a range of outcomes in a variety of contexts (i.e., education, politics, entrepreneurship, employment). • *Concern* – Need to emphasize caste more in the discourse on development. • *Literature covered* – Wide-ranging (e.g., economics, development studies and sociology, but not management). • *Overlap*: 36 (24 papers + 11 books + 1 reports) out of 259 works we review.
Munshi, K., 2019 Caste and the Indian Economy. *Journal of Economic Literature*	• Caste influences various aspects of the Indian economy. • Caste/*jati* networks serve as sources of insurance, business opportunities, and trust, which enhances efficiency for members within the caste, but exclude others. Opportunities to upgrade occur to other castes when exogenous shocks occur. • Caste influences access to and returns from the labor market via discrimination.	• *Audience* – Economists. • *Focus* – Broad; agrarian markets, business, labor, education, politics and public resources. • *Concern* – Summarize evidence on the effects of caste. • *Literature covered* – Limited (economics). • *Overlap*: 21 (15 papers + 6 books + 0 reports) out of 259 works we review.

Appendix 3

Terminology of Caste and Related Background

The caste system has developed over millennia, generating variations across regions and religions, partly due to sociopolitical reforms and resistance. This has resulted in scholars using an array of terms that were variously used in scriptures, in bureaucracy, and public discourse, many of which also evolved as their connotations were contested. Understanding this terminology would allow scholars to frame research questions more precisely, identify appropriate research contexts, interpret findings that capture reality, and enable clear communication of research findings.

We categorize the various terms of caste into three groups based on the domain in which they have been predominantly used: scriptural (i.e., Sanskrit terms used in religious scriptures), bureaucratic (i.e., terms used in government parlance and census), and public discourse (i.e., terms used in media and social movements). We map these terms in Figure A3 to provide a visual representation of their evolution.

---------- Please insert Figure A3 about here ----------

Scriptural terms

The terms *Brahmana, Kshatriya* (and its earlier version *Rajanya*), *Vysya*, and *Shudra* were mentioned in the *Purusha Sukta*, a hymn in the scripture, *Rig Veda*. The Rig Veda noted these terms in reference to different types of people with specific societal roles. These four categories were referred to as the *Savarnas* (meaning those who are part of the varna system). The first three categories – Brahmin, Kshatriya, and Vysya – are also known as *Dwija* (twice-born – born physically first, and then born again spiritually as individuals pursuing education related to their ordained profession). This second birth for boys is often marked in youthhood by a ritual of passage conducted by a priest and involves the giving of a "sacred thread" that the receiver wears across his shoulder. There are additional rules/ceremonies regarding the use, maintenance, and replacement of this thread.

In contrast to the four categories in the varna system, the *Chandalas* (meaning someone who disposes of corpses (Islam & Parvez, 2013)) and "tribals" (who were referred to by their tribe names) were outside this system and were collectively referred to as *Avarna* (meaning one without varna or the "outcastes," as they were categorized when the terminology of caste became prevalent during colonial times). While both the "untouchables" and "tribals" were understood to be outcastes, only the former group was considered inherently impure, and was required to live in ghettos outside the settlements that were organized based on caste. Hence, the term "untouchable" came to be used specifically for those earlier known as *Chandalas*. Within these broad categories, there were many *jati* (meaning kinship, Mayer, 1960), which is attributed to endogamous communities who were assigned an ordained occupation. Although these terms (e.g., Brahmana and Chandala) originally appeared in scriptures written in Sanskrit, they were later adopted in other texts and public discourse.

Bureaucratic terms

The use of "caste" and related terminology to denote the varna system and varnas/jatis began in the 16th century when Portuguese travelers and colonizers attempted to describe the system they encountered in the Indian subcontinent. Such use solidified during the British

colonization of the region and thereafter. British conducted multiple censuses from 1872 to 1931, which assigned various labels to different caste groups across censuses (Raj, 2018), but Brahmins stood as the most prominent, and singular caste in all of those (Dirks, 2001). The British census brought more visibility to different castes, especially the lowest castes, and "untouchables" (Hutton, 1933) and "tribals" who were referred to as the "depressed classes" until 1936. Additionally, some nomadic and semi-nomadic communities were notified (i.e., listed) under Criminal Tribes Act, 1871 as being "born criminal", creating a category of Criminal Tribes (Bhukya & Surepally, 2021).

In the late 1930s, when the caste schedule (which was essentially a list) was prepared for the reservation of seats in education, public employment, and public offices, "untouchables" were officially labeled as scheduled castes (SCs), while "tribals" were labeled as the scheduled tribes (STs). Consequently, SCs and STs became the official terminology for the "untouchables" and "tribals" when the constitution of India was adopted in 1950. Within this nomenclature, sub-caste was commonly used to refer to *jati*, i.e., different endogamous groups within each caste group as based on their ordained profession.

The castes that were socially and educationally backward, but not outcastes (i.e., who were not SCs and STs), were referred to as Backward Classes, who were predominantly *Shudras* (i.e., the lowest rung of the *varna* system). However, caste groups from other religions were also included in these Backward Classes, e.g., Ansari from Muslims and Christian Nadar from Christian communities. It should also be noted that the inclusion of a caste in SC/ST/BC categories can vary depending on the state and central lists of these caste categories. A caste can be SC or OBC in one state, but not in the neighboring one, e.g., Khatik caste is considered SC in Punjab but classified as a Forward Caste in neighboring Uttar Pradesh (Bayly, 1999).

In line with provisions in the constitution of India to improve the conditions of "socially and educationally backward classes," the Indian government identified the disadvantaged within these Backward Classes based on a set of eleven criteria, including social, educational, and economic, and categorizing them as Other Backward Classes (OBCs) and introduced reservations for them. Further, some states (e.g., Bihar, Tamil Nadu, and Uttar Pradesh) in India have categorized backward castes into Most Backward Castes (MBC) and Extremely Backward Castes (EBC) to further classify them according to their level of backwardness and provide reservations. Additionally, the erstwhile notified tribes – now called De-Notified Tribes (DNT) following the repeal of the Act under which they were notified as criminals, are specifically targeted for reservations and other equal opportunity initiatives.

Those who were not eligible for reservations (i.e., those not listed under SC, ST, or OBCs) came to be called "Forward Castes" or "General Castes" or "Other Castes". As these terms are used to refer to groups that are not specifically identified otherwise, one can infer that they refer loosely to Brahmins, Kshatriyas, and Vysyas, as well as some Shudras/Backward Classes who experienced social and educational progress. With the implementation of reservations for Economically Weaker Sections (EWS) in 2019 for those individuals other than SC, ST, and OBCs, a new term (i.e., EWS) has entered the discourse. But this term, applied to individuals in the context of reservations, does not apply to an entire caste group, but only to households in the forward castes whose family income and assets fall below a threshold. Some of the Shudras/Backward Classes were also referred to as dominant castes (Srinivas, 1959) to highlight circumstances where their local power was higher than what might be expected based on their status in the varna hierarchy.

Public discourse

The caste system attracted much attention from social reformers who sought to achieve equality and greater representation. For example, at the beginning of the 20th century, the term *Achoot* (meaning one whose touch defiles, or "untouchable") was ascribed to the outcastes or *Chandalas*. As a way to oppose the practice of untouchability, Mahatma Gandhi labeled the SCs as *Harijans* (i.e., children of God). Even though this term was rejected by the untouchables themselves, including by Gandhi's contemporary Dr. B. R. Ambedkar, the label remained in use until the 1970s when some untouchables self-labeled themselves as *Dalits*, meaning broken people. Similar political and social movements resulted in the use of the term *Adivasi* by STs (i.e., first inhabitants, rejecting the earlier term *Girijans*, which translates to mountain people) and *Moolnivasi* (i.e., original inhabitants) by both SCs and STs. Likewise, the term *Bahujan* (meaning the "vast majority") was also coined to refer to SCs, STs, and OBCs, which in practice has become identified with OBCs, as according to many demographic estimates, they make up the majority of the Indian population.

In public discourse, the term "upper castes" is commonly used to collectively refer to those groups who are placed in the top three categories of the varna system. These groups are also commonly referred to as *savarnas*, which is a usage that departs from the literal meaning of the term "savarna," as mentioned earlier. Additionally, the term "upper castes" is also used to refer to those groups categorized as General. Even though terms related to privilege (e.g., privileged castes or caste privilege) are also used in public discourse recently, they have not gained currency. As such, they do not specifically refer to a particular caste or a caste group and may need to be understood based on the context in question, i.e., depending on the group whose privilege is being discussed, because privileges vary based on a caste's position in the hierarchy, and conditional on the specific geographical location. On the other hand, the terms "lower castes" or "marginalized castes" are used to refer to Backward castes, Dalits, and *Adivasi*.

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Figure A3: Terminology of Caste

<table>
<tr><th>Domain of Terminology</th><th colspan="3">Scriptural</th><th colspan="4">Bureaucratic Terms</th><th colspan="3">Current Discourse</th><th>Estimated Population Share amongst Hindus*</th></tr>
<tr><th rowspan="2">Time Period</th><th colspan="3" rowspan="2">1500 BC to 600 BC</th><th colspan="3">1800s to Pre-Independence (British Colonial Rule)</th><th rowspan="2">1930s onwards</th><th colspan="2" rowspan="2">2000s</th><th rowspan="2"></th></tr>
<tr><th>Census (1871-72)</th><th>Census (1881)</th><th>Census (1891)</th><th>Census (1931)</th></tr>
<tr><td rowspan="6"></td><td>Brāhmana</td><td rowspan="3">Dwija</td><td rowspan="4">Savarna**</td><td>Brahmins</td><td>Brahmins</td><td rowspan="6">Occupational Castes</td><td rowspan="4"></td><td>Brahmins</td><td rowspan="5">Forward Castes, General, Others</td><td>Brahmins</td><td rowspan="3">Upper castes/Forward castes/savarna</td><td>5.7</td></tr>
<tr><td>Rajanya</td><td>Kshatriyas</td><td>Kshatriyas</td><td>Kshatriyas</td><td>Kshatriyas</td><td>4.6</td></tr>
<tr><td>Vysya</td><td>Vysyas</td><td rowspan="3">Other Castes</td><td>Vysyas</td><td>Vysyas</td><td>2.2</td></tr>
<tr><td>Shudra</td><td rowspan="3"></td><td>Shudras</td><td>BC, OBC</td><td>BC, MBC, EBC</td><td rowspan="3">Lower/Marginalized castes</td><td>41</td></tr>
<tr><td>Chandāla</td><td rowspan="2">Avarna</td><td>Outcastes</td><td>Achoots, Harijan, Scheduled Castes (SCs), Dalits</td><td rowspan="2">Depressed Classes</td><td rowspan="2">Bahujan, Moolnivasi</td><td>Dalits</td><td>16.6</td></tr>
<tr><td>Identified Tribes</td><td></td><td></td><td>Scheduled Tribes (STs), Indigenous, Girijan</td><td>Adivasi Indigenous</td><td>8.6</td></tr>
</table>

Notes:
* Source: Attri P S, Joshi C, Bapuji H. 2021. Cisco Systems Inc.: Caste conundrum regarding diversity and inclusion. Ivey Publishing (Case# W24737), Western University, London, Canada.
** Savarna is used predominantly to refer to the top three castes, it sometimes includes OBCs as well.

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