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Understanding Gender and Agrarian Change under Liberalisation: The Case of India

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December 3, 2004

Prepared for the UNRISD report
Gender Equality: Striving for Justice in an Unequal World

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INTRODUCTION¹

The neo-liberal turn in recent decades has ushered in policies of liberalisation², deregulation and commercialisation across the world, and the consequences have been complex and contradictory for development goals of poverty and inequality reduction. Understanding these effects is methodologically difficult, but in spite of the complexity and the challenges, it is very important that we try to grasp these connections in the interests of more effective and equitable policy. This paper will focus on India, rather than the whole of south Asia, because the diversity of experience across the region may obscure the relations we seek to uncover, and because India is both a very large and a paradigmatic developing country. It will first consider what liberalisation has meant in practice in India, with a focus on agricultural reforms, and will then discuss some of the methodological complexities of seeking connections between liberalisation and particular gendered outcomes. The main part of the paper then considers how gendered rural livelihoods are changing and what is happening to forms of social reproduction³.

Gender marks a primary form of social differentiation and inequality, and Karin Kapadia has linked liberalisation to ‘an erosion of women’s rights and social status ...and a deterioration in women’s position in contemporary India’ (Kapadia 2002b: 33-34), a claim which we hope this paper will explore in some detail, although the material one would have wanted for such an exercise remains very limited, and it generally offers a sex disaggregated account, rather than gender analysis.

The degree of variation between states and cross cutting agroecological domains in rural India, with their particular histories, makes any analysis of gender relations a complex task. In addition, within these spatial and temporal locations class, caste and ethnicity create distinctive kinship and marriage patterns constitutive of very different gender relations. These are often reduced to comparisons between the more subordinated women of north Indian cultures and less subordinated women of south India, although Unnithan-Kumar points out that contrasts between north and south India can be overdrawn. Her Rajasthan material on the Girasia ‘indicates that the differences between north and south India are not necessarily that absolute. ...[t]he distinction is perhaps a primarily text-based one, but when we look at popular practices it is not so clear’ (2001:266). Despite variations between regions there are however trajectories of change which appear to have considerable reach; sanskritisation amongst lower castes and ‘tribes’, the spread of dowry into new social spaces, the deepening of son preference and consequent masculinisation of landed rural households, as well as positive changes such as rising age at marriage, closing gender gaps in education, and rising life expectancy.

¹ We would like to thank the following for useful comments on this paper: Kunal Sen, Madhura Swaminathan, Richard Palmer-Jones and the UNRISD reviewer. Errors and interpretations, however, remain our responsibility.

² In this paper we use the term liberalisation fairly broadly to refer to the wide range of policies covering the delicensing of industrial investment and production, removal of export subsidies, reduction of fertiliser and other input subsidies, shift from import quotas to tariffs and reduction in tariffs, financial liberalisation measures and easing the rules for foreign capital inflows. These have led to cutbacks in state social sector expenditure (health and education provision), in food subsidies, institutional credit, agricultural extension and rural development programmes.

³ What we do not pursue here, for want of space, is the shifting terrain of state discourse on gender.

Table 1 shows some indicators of changing gender and wellbeing at an all-India level, and what they portray is rising wellbeing overall, with however areas of concern, such as the maternal mortality rate. Locating the problem areas requires a disaggregated analysis and Rustagi (2000) shows in her presentation of gender development indicators just how variable the picture of gendered wellbeing is. With a district level, and rural, focus she seeks to identify at this finer focus, the areas showing particular gender problems. Using the indicators of sex ratios, education, female literacy, female infant and child mortality, age at marriage, fertility, and work participation, she finds that in the states of Rajasthan, Haryana and Punjab all districts reveal poor status of women, in Uttar Pradesh, Madhya Pradesh and Bihar most districts do, and in Andhra Pradesh, West Bengal and Orissa lower numbers of districts present poor results, whilst Karnataka, Kerala, Tamil Nadu, Himachal Pradesh, Maharashtra and Gujarat record relatively favourable situations (2000: 35). One remarkable feature of such comparisons is the troubling and complex relationship between economic growth and gender inequality, since equality indicators for north Indian states which have seen dramatic agricultural growth are worsening, gender disparities are highest in the wealthiest northern states, and a number of studies find sex ratios worse in more agriculturally advanced villages (eg Roy 1995:198, Nillesen and Harriss-White 2004). This pattern emphasises the importance of separating poverty/wellbeing analysis from gender analysis.

It also raises the question of various pathways to gender effects of liberalisation, ie if it succeeds (women are more prosperous as persons but more disadvantaged as women), if it fails (women are less prosperous as persons but also inhabit less gender biased worlds), and, a grim lose-lose scenario in which they are both worse off as persons and as women. We return to these issues in the conclusion.

Table 1: Selected indicators of gender and wellbeing

Year	HD R year	Female adult literacy	Female GER (combined)	Female life expectancy	IMR	MMR per 100,000 live births	Total Fertility rate	Share of earned income	GDI	GEM
1992	1995	35.2	45.8	60.4	82	460	--	19.2	0.401	0.226
1994	1997	36.1	47	61.4	74	570	3.0	25.7	0.419	0.228
1995	1998	37.7	46.5	61.8	73	570	3.2	25.4	0.424	0.228
1998	2000	43.5	46	63.3	69	410	3.3	37.0	0.545	n.a
1999	2001	44.5	49	63.3	70	410	3.3	37.0	0.553	n.a
2001	2003	46.4	49	64	67	540	3.0	37.6	0.574	Na.

Source: UNDP's Human Development Reports for different years.

Note: The indicators presented in this table follow the UNDP definitions (combined GER stands for the Gross Enrolment Ratio at Primary, Secondary and Tertiary levels; IMR is the Infant Mortality Rate per 1000 live births, MMR the Maternal Mortality Rate, GDI the Gender-adjusted Human Development Index, and GEM the Gender Empowerment Measure. No information on GEM is available for India after HDR 1998).

1. METHODOLOGICAL QUESTIONS AND CAVEATS

Trying to understand the effects of liberalisation on rural women in India is an important endeavour, but it is not an easy one, being beset by methodological problems, of evidence and information, of procedures, of assumptions and conceptual uncertainties, and the generally difficult business of extracting meaning from empirical data.

Definitional issues:

Data relating to women's employment is quite problematic to interpret as a number of authors have pointed out. Bhalla and Singh (1997: A-12) point out in their analysis of changes in the agricultural labour force between 1962 and 1995 that the frequent changes in definition mean that the numbers of female workers in agriculture are not really comparable over various censuses, especially for 1971. Kapadia (2002a) also argues that as men are moving into non-agricultural occupations their wives are more frequently defined as cultivators in census exercises, thereby creating an impression, which is more apparent than real, of rising numbers of women cultivators. Furthermore, Ramachandran et al (2001:2) note that one of the problems with tracking changes in women's employment is not only the changing work definitions in the census, but also the consistently lower rate of women's work in the census compared to the National Sample Survey (NSS) results, and even the latter is an underestimate (by some 5 per cent) by comparison to time use studies piloted by NSS in 6 states. And confusingly for the 1980s the NSS shows a rising pattern and the census a falling one. Such data therefore needs to carry a health warning, and is best understood through triangulation with other data sources.

Attribution issues:

Although the language of cause and effect is no longer used with the innocence of earlier times, we are nevertheless working with an implied relationship between liberalisation as 'cause' and gender relations as 'effect', and therefore of the need to attribute. But attribution of effects to liberalisation is very difficult because the 'before and after' comparison implied is impossible to identify with much clarity.

Ideally, one would wish to identify the mechanisms through which specific policies introduced in India as part of a package of liberalisation measures produce identifiable outcomes. The first attribution hurdle is distinguishing the effects of liberalisation from macroeconomic stabilisation which is important (Bardhan 1998: 122) but complex. Setting this aside, simplistically, one would expect that liberalising the economy will stimulate markets and lead to increased employment and consumption and thereby grow the economy in a virtuous circle, with states increasing investment in human capital and the wellbeing of the poor improving through better education and health, and inequalities diminished through these mechanisms, and more political participation. But, in general, policies rarely set off a domino effect of this kind since there are so very many points at which they simply fail to knock over the neighbouring domino, for a multitude of reasons, or unexpectedly topple over into an unexpected direction. For example, policies may be adopted at the centre but not by states, they may be delayed in execution, subverted in meaning or implementation, neutralised or even reversed by contradictory policy initiatives and so on. Where we can, we point out how the politics of liberalisation policy have affected the theoretical

mechanisms whereby liberalisation increases wellbeing, but this a major field of study and not the focus of the present work.

In theory the impact of liberalisation on the rural sector was expected to operate through removing discrimination in 'terms of trade' against agriculture. Liberalisation would then lead to a rise in agricultural production (and related non-farm rural employment) which would benefit rural people including women. Furthermore, with more rapid economic growth women would benefit through greater public spending - in the medium term. Both these ideas follow what appear to be robust empirical relations between agricultural growth and poverty reduction and between public spending and well-being. This set of expectations did not address intra-household issues of course.

Many of the social processes observed in agrarian India are long established and have not been initiated in the early nineties. The question of the extent to which they have intensified under liberalisation requires a clear idea of the counterfactual, ie what would have happened without liberalisation, and this too is highly problematic. The time scales involved for effects to emerge and the spatial variations across Indian states create further challenges. In the light of these issues it would be misleading to over-readily attribute change to liberalisation policies. We prefer to offer an analysis of directions of change within a longer time period, and to point out, where it is possible, that these are linked to such policies. A longer term perspective is necessary in order to see what are long standing trajectories and what are new developments, to get a sense of the overall direction of change in poverty and inequalities, and to contextualise liberalisation policy and avoid assuming it to be more influential than it actually is.

A more prosaic but equally important issue which affects the attribution of effects, and also relates to time, is the question of what base year is used for comparative (ie implying before and after liberalisation) purposes (eg see Palmer-Jones, 1999). Deshpande and Deshpande (1998) show that the choice of base year and end years in comparisons can make big differences to quantitative analysis, because of effects like rainfall. In relation to climate, many Indian states have seen three years of drought recently which makes recent performance hard to judge, since drought years affect outputs and employment dramatically. Unusual weather in the last three years must be taken account of; 2001 saw a record level of food grain production of 212 million tonnes but 2002-3 was a drought year and this dropped to 183 million tonnes (Sunderam 2003, 67), whilst the latest figures for 2003-4 suggest a bumper year with an output once again of 212 million tonnes (The Hindu, February 20, 2004).

Finally, the question of the appropriate time period for evaluating a policy shift such as liberalisation is also important. Short run impacts are dominated by stabilisation rather than by adjustment proper, and effects are rolled out over a period of time. What this period is will vary, but work in Bangladesh (Hossain cited in Rogaly et al 1999: 26) suggests a 14 year spread. So while comparisons with the preceding decade produce particular verdicts, longer term comparisons may give a different picture of the performance of the 1990s.

Policy interactions:

Time periods are not the only problem in relation to attribution of effects to liberalisation; policy impacts are complex and interactive and the necessary data is seldom available. An instructive example is the collection of papers on agricultural growth in Bangladesh and West Bengal (Rogaly et al 1999). Poverty declined in Bangladesh in the early 1990s with rapid agricultural growth, and the trend from casual to piece rate work has increased earnings of the poor. But both West Bengal and Bangladesh saw considerable agricultural growth in the 80s and early nineties – despite very different policy environments – the redistributionist and interventionist policies of the left state government in West Bengal (particularly land reform) and the liberalisation of the Bangladesh government under World Bank pressure since the 1980s. It appears to be hard to see how the West Bengal land reforms, or indeed the liberalisation in Bangladesh can account for much of the increased agricultural performance (1999:14), a conclusion that could easily have been reached without a comparative policy examination. The growth of the early nineties in Bangladesh was followed by a disputed (Adnan 1999 and Palmer-Jones 1999) slowdown which in turn may be related to a rapid drop in the water table from excessive use of groundwater for irrigation (1999: 29), a longer term effect of the liberal policy regime.

Intra-household analysis

Another set of methodological challenges relate to the specific requirements for an intra-household perspective on livelihoods in gender relations analysis, which remains rare. Gender disaggregation into data on men and women is a useful first step but without data on members of the same households it is not possible to understand how transfers between household members redistribute the costs and gains from any particular material or cultural change – such as those to wage rates or marriage payments or education, for example. It remains true that whilst we have an increasing availability of data on women, we still lack what is needed to understand gender relations. Mainstreaming women as a variable in development research in general is no substitute for the kind of data collection needed for analysis of gender relations. There is also a continuing invisibility, in official statistics, of women within farming households, and a super visibility of women as agricultural labourers but these are increasingly the same people and not separate class fractions, and their separation leaves the problem of understanding how livelihood portfolios are integrated in actually existing households.

Gender analysis is an interdisciplinary field and draws on data and evidence from a number of different disciplines, which poses a particular challenge for analysts, who therefore need an unusual range and reach in their expertise. We have therefore to be vigilant in the use of evidence from other disciplines than our own in the meaning we attribute such evidence. An example of the complexity of commonly used indicators of gender equity is the question of widow remarriage, its presence often being taken to indicate cultures (often tribal and or low caste in comparison to mainstream upper caste Hindu practice) which are less controlling of women. However, a careful historical study in Haryana (Chowdhry 1994: 74) shows that widow remarriage as an historical form has continued to be practiced just where it is least expected, and generally takes the levirate form in which the wife is married by a brother or agnatic cousin of the husband, and has little choice in this matter. It is still practiced and growing in popularity based on the need to control land and keep it within the family

since in the absence of male heirs the wife inherits the estate for the duration of her life. Thus it is important to use indicators of women's well-being, such as the presence of widow remarriage, with care, and avoid simplifying assumptions which can be very misleading.

The habitus of researchers and respondents:

Finally, and in accordance with the tradition of reflexivity and reflection on personal values and politics in feminist research, it is worth noting our awareness of what might be called the habitus, ie the often unquestioned disposition, of gender researchers in development. This habitus includes a tendency to read social change negatively (bad and getting worse) so that nothing ever seems to improve. Since the 1974 Government of India, Status of Women Report the impression from gender research is that the position of women has been declining and thus one would expect that by 2004 the situation would be exceptionally bad. However, this would be a difficult position to sustain in the light of both evidence of important areas of improvement (see table 1) and indeed women's voices. This habitus is partly grounded in a need to focus on the legion of remaining problems, despite improvements, since the pressing question for gender justice is how to understand and initiate progressive change in relation to the shortfalls in wellbeing and justice which women experience. But evaluating change, and the impacts of policy shifts, deserves a critical perspective on our default settings in order to avoid losing sight of the bigger (historical) picture and retain the relevance of gender analysis for development policy.

Feminist researchers have no monopoly of habitus though – and certainly the respondents in research projects also carry their own dispositions in relation to accounts of social change. Sarah Lamb (2000) gives a good example of the tendency for Bengali narratives of the past to reflect the golden ageism so common in both ethnographic enquiries and surveys, which ask about the present in relation to the past. As she points out, people seem to be predisposed to see the past as a better place. Researching social change over time requires an awareness that in qualitative and quantitative enquiries there is a tendency amongst both researchers and respondents to glorify the past and darken the present, and that this must be triangulated in critical fashion with evidence which allows us to take account of this effect.

Given these methodological challenges we consider it wise to offer this analysis as an appropriately tentative exploration of the gendered effects of liberalisation in agrarian India, as a policy turn within a context of shifting degrees of state involvement in

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