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e-mail: kmseethimgu@gmail.com

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The Demonetization Fiasco

Prabhat Patnaik

The demonetization of 86 percent of the currency of the country, a virtually unprecedented measure anywhere in the world, has brought immense hardship to the working people of the country, and will damage their living standards permanently (since the Modi government plans not to replace the entire value of the demonetized notes by printing new ones). Many however believed that it was a step being taken for the greater social good, for achieving certain important social goals. Three of these goals were mentioned by the government from time to time: to attack black money, to replace counterfeit notes, and to encourage a shift to a cashless economy. The last two of these goals could have been achieved through a gradual withdrawal of old notes rather than a sudden demonetization of the sort that the government actually effected. The last of these goals is even a pernicious one anyway, since it pushes people from costless transactions, which cash transactions are, to more costly digital transactions. Only a government committed to transferring incomes from the working people to firms providing digital services, would consider this a worthwhile social goal and even use coercion for achieving it. The goal which appeared most persuasive to people was the attack on black money.

Most economists in the country, belonging to diverse ideological backgrounds, had argued that demonetization would not achieve this goal, that at the most it would only be a pinprick for the operators in the black economy, for which causing such mass distress was totally unwarranted; but even these critics had accepted that demonetization would administer a pinprick to the black economy operators. It now turns out however that demonetization has not even administered a pinprick to the black economy; it has been an utter fiasco with regard even to this one goal it was supposed to achieve, which most people had considered both worthwhile and pressing. With its failure to administer even a pinprick to the black economy, even the last fig-leaf of an argument in favour of demonetization has collapsed. Let us see why.

The case built for demonetization was that with the 500 and 1000 rupee notes no longer being legal tender, the cash held in the form of such notes in the black economy would cease to have any value. While the common honest people would come to the banks to exchange or deposit the demonetized notes in their possession, the black money operators would not dare to do so, for fear of exposing themselves for investigation. As a result, the notes held in their possession would simply get extinguished, which would be a major loss for them. The difficulty of recovering from this loss would deal a huge blow to the black economy.

In other words the mechanism through which the black economy was supposed to be hit was through the extinguishing of the 500 and 1000 rupee notes held by it; and the success of demonetization in crippling the black economy was to be measured by the value of the currency so extinguished. The government reportedly had expected that 3.5 lakh crores of rupees would get extinguished in this manner; and economists emphasizing the futility of demonetization as a weapon for combating the black economy, had argued that even if this happened, since the sum of 3.5 lakh crores of rupees was a small fraction even of the profits of the black economy, its extinction would not make much difference to this economy, though they had expected the actual value of extinguished currency to be much smaller than this. This however was the figure for the extinction of old notes that the government had expected. So sanguine had the government been about the extinction of a sizeable amount of old notes, that it had even promised substantial largesse to the people on the basis of such extinction. The argument had gone as follows. Since the extinguished currency constituted a liability of the Reserve Bank of India, the extinction of this liability would be tantamount to an accrual of an equivalent sum as a windfall profit to the RBI. As the RBI was wholly-owned by the Government of India, its profits constituted the income of the government, so that the value of the extinguished currency would ipso facto constitute budgetary resources for the government and hence be available to it for spending. And BJP leaders went to town claiming how this “masterstroke” by Modi had enabled the government to spend huge amounts of money for the people’s welfare or for direct distribution among them.

This argument of course was wrong. The extinction of some liabilities of a government-owned institution does not ipso facto constitute profits of that institution and become available for spending by the government. For if that was the case, then the non-performing assets of the nationalized banks, by the same logic, should cause a reduction of an equivalent amount in the government’s expenditure, which is absurd. The balance sheet and the profit-and-loss accounts of any institution are separate, though related, entities; but one of them cannot be directly translated into the other.

But the following more plausible argument could nonetheless be advanced. The extinction of a part of the liability of the RBI enables it to reduce its assets to an equivalent extent, through simply writing off government debt to it. In that case the government could freshly borrow an equal amount from the RBI, without its overall indebtedness going up. In other words though the government could not claim the value of the extinguished notes as its income, it could certainly issue fresh debt of an equivalent amount with impunity; even international finance capital, opposed to fiscal deficits, could be persuaded that fresh borrowing of a value equal to that of the extinguished notes, did not constitute an increase in the fiscal deficit. All such hopes and claims however have been dashed, since it now turns out that by the December 30 deadline for depositing old notes, the banks had got back as much as 97 percent of value of the demonetized currency, either for exchange against new notes (a facility that was subsequently discontinued) or as deposits. Against Rs.15.4

lakh crores which were demonetized, nearly 14.9 lakh crores have returned to the banks, leaving only forty-odd thousand crores of extinguished currency. The question of larger government expenditure because of the reduced liability of the RBI therefore simply does not arise, since the magnitude of reduced liability is such a trivial sum.

More importantly however the impact on the black economy is almost nil. In the forty-odd thousand crores of rupees which have been extinguished, a fairly large amount would belong to people who have nothing to do with any black activities, but who, for various reasons ranging from illness, to infirmity, to procrastination, to confusion arising from the government's frequent, bewildering and illicit changes of rules and deadlines governing the return of demonetized currency, could not turn in their old notes in time. The extinguishing of old notes belonging to the black economy, which the government had expected to be around Rs.3.5 lakh crores when embarked on demonetization, is virtually nil.

The demonetization measure, while causing immense distress to the people, and severe damage to the economy that is not just immediate but would linger into the future, and not just to the informal sector but to the formal sector as well through the reduction in the informal sector's demand for its goods, has produced nothing, literally nothing, by way of curbing the black economy, which was its commonly believed *raison d'être*. Most economists outside of the government, and of private institutions currying favour with the government, had emphasized the misconceived nature of this measure; but it turns out to have been even more misconceived than what its staunchest critics had imagined. And this is so, as already noted, by the criteria that the government itself has been proclaiming till now.

Needless to say, even this government whose brazenness is unprecedented, has been discomfited by this figure of the return of old notes. Its initial reaction was to question the data, though they came from none other than the RBI itself, by bringing in a lot of red herrings. But fresh rounds of data continued to pour in about the absence of extinction of the old currency; so finally, it has announced that until a thorough check is made, all these data should not be taken seriously. It has thus prepared the ground for “doctoring” the data in the name of a thorough check; but all such “doctoring” will be of no avail and its effort to hide the truth will come to naught.

The return of virtually the entire demonetized currency to banks is indicative both of the fact that the supposition of there being large cash-holding in the black economy was wrong, and also of the fact that black economy operators are always capable of taking steps to evade any such measure, while it is the poor working people who become its victims. Both these facts were known to most people; now they have been borne out by the government’s own statistics. The evasive measures taken by the black money operators have ironically led to a proliferation of the black economy, while the purported objective was to curtail it.

Demonetization has been a fiasco in achieving its stated objective, apart from being a disaster for the people. The Modi government, however, true to its character, will never admit its mistake, never make a self-criticism, never consult the Opposition on how to redeem the situation and ameliorate the unnecessary distress it has caused. On the contrary it will pile on even greater agony for the people in its attempt to cover up what it has already done.

(c) Prabhat Patnaik Courtesy: People’s Democracy

The Political Economy of Demonetising High Value Notes

Jayati Ghosh

The Modi government is extremely adept at optics, at policy measures presented in a blaze of publicity that dazzles the public, rather than with the required attention to detail that might ensure their success. The latest announcement of the demonetisation of high value bank notes is of the “shock and awe” variety of measures. While presented as evidence of the government’s supposedly firm resolve to root out black money, in reality it will barely touch the problem of generation of black money, even as it is being implemented in a way that causes immense economic harm to ordinary people and especially to poorer sections of society.

The demonetisation of bank notes per se is not the problem. Indeed, it has occurred periodically in India and many other countries, both to reduce concerns about counterfeiting and to spread the use of cash-based illegal transactions. To the extent that it reduces these, it should certainly be welcomed. However, when this has been done in India in the past or in other countries, it has typically been done gradually, allowing adequate time for people to replace the old notes with new ones to prevent too much disruption of economic activity. This overnight shock, by contrast, is hugely destabilising, with likely medium-term material damage to a very large part of the population. It affects very little of the stock of ill-gotten wealth and does nothing about its generation, but it has severe impact upon ordinary people, whose lives have already been hugely disrupted.

Government spokespersons argue that secrecy and speed were of the essence to achieve its goals. Otherwise, they state, those hoarding black money would simply be able to convert their cash into “white” through buying other assets in the intervening period. But this argument is completely specious. Suppose the government had announced that (say) from 1st December the old notes would no longer be valid. It could then start tracking all large sales of likely assets (such as land, houses, gold) and foreign exchange transactions, to follow up with those

who had made them. This would have involved no cost to the ordinary law-abiding citizen but still provided the government with all the information it needs to ensure legal and tax compliance from such individuals.

Instead, the shock announcement seems to have emerged from the current government's penchant for drama and propensity for so-called "big bang" reforms. Other explanations have been put forward about the timing of this move: the need to distract the media – and indeed the entire society – from the government's increasing repression of the media and of all forms of democratic dissent, which had recently become a major issue of concern; and the upcoming elections in the two important states of Punjab and Uttar Pradesh, in which rival parties would definitely be wrong footed by this announcement while the BJP might just have got some sort of heads-up before the action. (Indeed there have already been accusations that several accounts held by BJP members in different parts of the country were suddenly filled with large deposits in the month before this dramatic announcement, and that members of the ruling party were informed about this demonetisation well in time to take precautionary measures.)

In any case, both design and implementation of this scheme have been far from ideal. In terms of design, the secrecy and suddenness have already been noted as creating completely unnecessary problems, which have hugely affected ordinary people across the country. In addition, the government clearly failed to recognise that, given the rise in prices over the years, it is absurd to treat Rs 500 as a "high-denomination" note that poor and middle class people are not likely to use. Given the prices prevailing for many essentials like food items and medicines (with some dals costing nearly Rs 200 per kg for example), it is absurd to consider that Rs 500 would be an amount that only rich people or black marketeers would use. These Rs 500 notes accounted for more than two-thirds of the notes in circulation, and removing those at one stroke inevitably has had huge repercussions on liquidity, markets, production and consumption across the country.

In fact, when the Morarji Desai government had demonetised high value bank notes in 1978, it cancelled only those notes with values of Rs 1000 and above – and Rs 1000 at that time would be the equivalent of Rs 25,000 today! As it happens, precisely because the notes involved were of such high value at the time and accounted for only 0.6 per cent of the money in circulation, the demonetisation of 1978 was not so badly felt by ordinary people. However, even then the RBI Governor of that time, IG Patel, pointed out that "such an exercise seldom produces striking results" since people who have black money on a substantial scale rarely keep it in cash. "The idea that black money or wealth is held in the form of notes tucked away in suit cases or pillow cases is naïve." And in any case, big players holding large amounts of undisclosed cash can usually find agents to convert the

notes through a number of small transactions “for which explanations cannot be reasonably sought.” Yet the government was insistent, and so “the gesture had to be made, and produced much work and little gain.” The economists Brahmananda and Vakil noted that a measure like this “has primarily a political and not economic objective. In such a case it becomes a business in and among politicians.” (Quoted by Vikram Doctor in the Economic Times, 12 November 2016) If this is what has driven the current exercise as well, then perhaps the government’s willingness to tolerate and justify the massive administrative glitches and associated harm to common people are easier to understand. In terms of implementation, what has been even more surprising than the design is the apparent lack of preparation on the part of the administration for such a major move. Once again, the need for secrecy is being advanced for this, but that argument is untenable. The chaos evident in the week after the announcement is partly because not enough notes have been made available to banks and ATMs, and arrangements to deal with what should surely have been an expected rush to exchange notes were completely insufficient. Removing most (86 per cent) of the currency in circulation at one stroke is a huge move that necessarily constrains the payments system and can even bring it to a halt in parts of the country where the new cash notes do not become readily available. It is surely foolhardy to imagine that economic activity in such a heavily cash-based economy as that of India would be unaffected if these volumes of currency are not very rapidly replaced. Then again, the choice to introduce first the Rs 2000 note rather than the Rs 500 note is mystifying: obviously, this would hardly create an effective liquidity substitute for the Rs 500 note, yet government representatives appear to be surprised when people complain that they cannot find anyone to give them change for the higher value note.

The shortage of other lower value notes, that is inevitable when only newer notes of even higher value are being introduced, should also have been anticipated, yet that too was not factored in. In any case, surely if the idea is to eliminate black money, then it is hardly desirable to introduce even higher value notes that would presumably be even easier to store for those holding large quantities of undeclared cash. If the Prime Minister is correct in claiming that this was not a sudden move but something that has been planned for nine months, then it is incredible that so little effective preparation was made. It appears that there was little official recognition of likely implementation problems: the government began by claiming that things would be sorted out in a matter of days, then weeks, and most recently fifty days, during which time the Prime Minister has asked the people of the country to bear with him. But it beggars belief that simple matters like ensuring that the RBI has sufficient notes to replace the ones that have been demonetised, or that ATMs are appropriately configured, were not taken care of before going through with this,

especially as there is no pressing need for choosing this particular moment to do so. Still, all this would have been worth it, if indeed such a move would eliminate all black money in the country. But in fact, it will do little more than scrape the surface of the problem, even if it does so in a blaze of hyperbole.

The nature of “black money”

What exactly is “black money”? The first mistake is to see it as a stock of cash or pile of accumulated assets, because it is not about stocks at all so much as flows or transactions that are concealed from authorities or under-reported, so as to avoid taxes and various other regulations. Bribery and other instances of corruption are one form of such transactions, but there are many other forms, such as under-invoicing and over-invoicing by companies of all sizes, under-reporting of the values of sales of goods and services by individual providers, overstating of costs, reporting false or non-existent transactions and of course criminal activities of various kinds. Many of these do not necessarily require cash transfers at all but can be just as easily (and more speedily) done through electronic means, and relate to different sorts of account keeping.

Also, money does not acquire a particular colour and keep it; as it flows through different transactions, it can move through white, black and grey hues. For all these reasons, estimates of the exact amount of “black money” in the system at any given time are necessarily problematic, since they rely on assumptions about both the number and the value of unrecorded and tax-evading transactions. A recent estimate by a private agency has claimed that black money amounts to 20 per cent of total GDP or 25 per cent of recorded GDP, which would make this one of the lowest in the world already. However, the NIPFP Report on the incidence of black money in India (which was submitted in December 2013 but has still not been made public or even submitted in Parliament) is reported to have suggested that the black economy amounts to as much as 75 per cent of the recorded GDP.

Most of this is not – and indeed cannot be – held in the form of local currency. It is more than obvious that those who are significant recipients of such funds would speedily seek to transfer them into other assets. In India today, these are mostly land and other real estate property, gold and jewellery, benami accounts in banks, holdings of dollars and other global reserve currencies, holdings of stocks and shares through the anonymous vehicle of Participatory Notes and, most of all, sending the money abroad through various means.

Let us try to estimate what proportion of the money in circulation is black money that could be flushed out by this new measure. As noted above, estimates of the incidence of black money vary between 25 and 75 per cent of GDP. Meanwhile,

we know that currency in circulation currently amounts to 12 per cent of GDP, and 86 per cent of this currency is in the form of Rs 500 and Rs 1000 notes.

But we also know that a significant proportion of our GDP – around half, according to current CSO estimates – is produced in the informal sector, and around 85 per cent of the population relies on it. This is unrecorded income, even though it is estimated in the GDP, but it is dominantly not “black” because incomes here are generally too small to fall into the direct tax net and are anyway subject to indirect taxes of various kinds. Indeed, the incomes of farmers (which are not taxed), the returns of small traders and micro entrepreneurs, the incomes of daily wage workers, the incomes of small service providers: all these and many more such incomes are clearly the result of what would be considered as “white” transactions even though they are not registered and reported to any fiscal authorities.

This informal economy in India is hugely, if not completely, dependent upon cash. The preponderance of the informal sector is indeed why more than 90 per cent of all transactions in India are still estimated to be in cash. It is not unreasonable to assume that anywhere between half to all of the estimated GDP of the informal sector would be in the form of cash transactions. Since estimated cash balances amount to 12 per cent of GDP, the cash equivalent of anything between 3 to 6 per cent of GDP is involved in such informal activity, which is completely legal.

This in turn suggests that a move to demonetise larger denomination notes of Rs 500 and Rs 1000 would be successful only to the extent that it flushes out the part of black money that is held in cash, which would then be equivalent to 2.3 -5.2 per cent of GDP. In terms of the available estimates of black money, this comes to only 3.4-6.8 per cent of the NIPFP estimate of black money or 10-20 per cent of the smaller recent estimate provided by a private agency. In all these cases, the numbers suggest that only a tiny or at most a small proportion of black money (or rather, of the assets acquired through illegal or unrecorded transactions) would be captured through this move.

The impact of sudden demonetisation

Whatever little effect this measure may have to bring such black money out into the open would still be an unmitigated benefit, if the move did not simultaneously cause so much grief to innocent citizens. The fact is that the both the insensitive design and the shoddy implementation have already cause a huge amount of distress to different people in various ways, and the pain is likely to linger for some time. The rapid and sudden strike without warning meant that ordinary people had no opportunity to prepare for it. The immediate impact – in the form of drastic cash shortages leading to immense hardship especially among less privileged groups;

long and tedious waiting times in queues that often prove to be fruitless because banks and ATM machines are unable to provide the required cash – all these have been widely portrayed in the media.

It is true that these are essentially temporary disruptions, which should be eased over the coming weeks. Even if that does not provide much comfort to those whose livelihoods have been adversely affected, there is the argument that this temporary pain is worth it to ensure the greater common gain of eliminating black money. As noted earlier, the latter goal is unlikely to be reached with this measure. However, some sectors like real estate are known for the fact that cash typically accounts for a substantial share of the transactions. Those engaged in this business (whether as buyers, sellers or intermediaries) who have been caught at the point when they happen to be holding large cash balances will be affected, and face substantial losses. To the extent that it curbs the tendency to demand a certain proportion of the price for a property transaction in “black”, and makes property more affordable, this is definitely a good thing.

However, there have been and will be other effects that are very damaging for the economy and especially for the groups that are already in a weaker position. It will definitely put a brake on economic activity. Indeed, the immediate dislocation, uncomfortable as it is, may even be less damaging than the medium term impact. The biggest negative effect is the loss of liquidity for the informal economy, which has already been of massive proportions. This has led to breakdowns in payments systems and has drastically affected trading. As the chaos continues, the knock-on effects on economic activity have grown. People hoard their slender cash holdings and do not shop; this affects large and small retailers who rely on cash sales; this affects their own demand for purchase of goods in the wholesale markets; and so on. Even in megacities like Delhi, there are reports of shopkeepers simply shutting their shops because of the lack of buyers as a result of the cash squeeze, while traders in mandis have been caught with huge amounts of unsellable stock of perishable items like fruits and vegetables because of lack of cash purchasers. This has permeated down the distribution chain to the small vendors and street hawkers. This has also affected production systems, as moneylenders providing working capital to small producers are unable to provide the new notes.

The decline in trade – even if temporary – has a knock-on effect on production, and thereby generates further negative multiplier effects in the local economy. There are already reports of daily wage labourers unable to find work because employers cannot pay them with the new money and are only able to offer old notes, which are now without value. All this is worsened by the impact that the cash shortage has on consumption, as people cut down on purchases of non-essentials and even of food and other essentials, because of the lack of liquidity with which to purchase

these items. Consumption squeezes have been especially dreadful for those facing medical emergencies. Many private hospitals and clinics are not accepting old notes. Even when public hospitals do accept them, they expect the patient's family to purchase the required medicines and materials required for operations, which in turn can only be with the new notes. Stories of individual tragedies resulting from this mess are abounding.

Of course, as always happens in capitalism, the market quickly responds to these needs, in the form of intermediaries who offer to collect the old notes and exchange them for a discount. The prevailing rates in Delhi in the days after the banks purportedly opened were at 20 per cent discount: Rs 400 for a Rs 500 note and Rs 800 for a Rs 1000 note. Similar rates were also being offered by market vendors for their goods. Those who are desperate to get hold of some cash quickly for whatever reason, or who cannot afford to lose a day's wages for standing in the queue at the bank, are then forced to take these rates. Since the people forced to take these rates also include the poor, this amounts to an attack on their already low incomes.

In rural areas, matters may be even worse. The cash distribution systems for the new currency notes that have failed so miserably in the major metros and other towns are unlikely to be much more efficient in villages. In any case, the number of rural bank branches has declined in past years, and these branches are now few and far between. Banking activities are supposed to be conducted through ATMs and though the Banking Correspondents, most of whom have been largely dormant for a while now, and thus far these systems have proved completely inadequate to the task of ensuring the supply of new notes.

This has led to some truly difficult circumstances, which will be hard to imagine for those in the administration or ruling party who fondly believe that demonetisation will simply lead all Indians to shift to cashless transactions. Migrant workers in Delhi report that in their home village in Uttar Pradesh, which is still not electrified, kerosene remains the essential fuel for lighting and cooking. But the current cash crunch has affected villagers' ability to buy kerosene as the local private dealer (the only one in the village) refuses to accept the old notes – so households must sit in darkness until they are somehow able to exchange their old notes for the new ones. Since the nearest bank is also some distance away and the villagers have received word that it has also not received the new currency, things are not going to improve anytime soon for them.

Farmers are in a particularly difficult condition. Across north and central India, and in many parts of the west and east as well, farmers have recently harvested the kharif crop and are now about to begin sowing the rabi crop. Many of them had

saved up the cash proceeds of their kharif sales to buy inputs for the next sowing season. They need money to buy seeds and fertilisers, and to hire tractors and other equipment – and they need it now, because the agricultural season does not wait upon humans. Even a day’s delay can be critical in some cases depending upon weather conditions, but these farmers have already been waiting nearly a week. In most rural areas, the compensating delivery of coupons promised to farmers has simply not materialised, and not all of them can access public supply systems for inputs, as these too have run out of supplies. If delays caused by this policy-created cash shortage affect sowing, it would surely be farce turned to tragedy for these farmers and for agricultural output. This particular policy move has also been shockingly gender-blind, and therefore has already had highly gendered consequences. Policy makers persist in seeing India in terms of households, not recognising that men and women can have very different requirements and relationship to banking. Around 80 per cent of women do not have access to the banking system, and even when they do, it is often in the form of joint accounts with their husbands. So saving up some money in cash hoards to guard it from husbands who would use it for drink or other such purposes, or to ensure some savings for children’s future needs, or to provide for medicines in case of illness, or even to protect themselves from abusive husbands, is a very common practice. There are numerous stories of women who now do not know what to do with these hardwon and carefully stored notes, and who have neither the time nor the capacity and autonomy to go and stand in those endless queues to exchange the money. When the amounts add up to what may seem like a tidy sum in the context, say Rs 50,000, the problem for the woman becomes more acute. She not only stands to lose control over the money, but even the knowledge of such a private hoard can infuriate the adult men in the house, with potentially violent consequences. Surely this is not the kind of black money that is being sought to be forced out into the open? It is extraordinary that those who introduce such a policy could have such little awareness of Indian society that they do not stop to think of such consequences.

The cashless society?

It is not as if at least some of these aspects are not known to those in the ruling party who are currently signing paeans to what they describe as this “historic move”, supposedly a game changer” in the reform process. Not so long ago, in fact in January 2014 when the UPA government had tried to phase out old Rs 500 notes issued before 2005 (and that too in a phased manner rather than this abrupt move), the then BJP spokesperson Meenakshi Lekhi had described the move as “an attempt to obfuscate the issue of black money stashed outside the country...

This measure is strongly antipoor. The ‘aam aurats’ and the ‘aadmis’ – those who are illiterate and have no access to banking facilities will be the ones to be hit by such diversionary measures.” So what could have changed over the past three years to make BJP leaders change their tune to such an extent? They would probably suggest that this time is different because of the much greater coverage of banking services through the Jan Dhan Yojana. Indeed, the official website of the scheme notes that on 1 July 2016, 25.45 crore accounts had been opened, with only around a quarter of them with zero balance and an average of Rs 1780 per account. This has led to the claim that almost all households in the country are now covered by banking. But despite these claims, it is estimated that around one third of the adult population does not have any bank account, even of the no-frills variety. Others may have an account, which has been dormant ever since they were made to take it on, but the distance from and sheer difficulty of getting to the nearest bank has meant that institutional banking plays no role in their lives. They rely on intermediaries – the BCs created by the banks themselves, or local middlemen who spring up to meet these gaps. So the logistical issues involved in exchanging the old money for the new would be huge in any circumstances, not to mention the strained and overstretched conditions of today. The Reserve Bank of India – which surely should know better than any of us the true state of the penetration of e-banking and digital transactions in the economy – had its own Marie Antionette moment in a press release of 12 November 2016: “public are encouraged to switch over to alternative modes of payment, such as pre-paid cards, Rupay/Credit/Debit cards, mobile banking, internet banking. All those for whom banking accounts under Jan Dhan Yojana are opened and cards are issued are urged to put them to use. Such usage will alleviate the pressure on the physical currency and also enhance the experience of living in the digital world.”

Statements like this make one wonder whether the RBI is living only in the digital world. Surely the worthies in that institution have some idea of the conditions under which banking and money exchange occur for most Indians? As well as some knowledge of the importance of electronic transactions in the wider world? It is worth noting that even in the United States, currency is said to account for around 63 per cent of transactions.

In fact, e-banking has been increasing in India, but the shares are still very small: cash is still estimated to account for more than 90 per cent of all transactions, and the remainder is approximately equally split between cheques and e-payments. The facile assumption that moving to e-banking is just a matter of personal choice, which appears to underlie some of these arguments, is completely mistaken. Of course, it is desirable to move to less reliance on currency, but that cannot be done in this abrupt and coercive manner, especially when most bank accounts are still not

e-enabled, when basic infrastructure for this (such as secure internet connections or even electricity) is not accessible everywhere, and where levels of education for a very large section of the population do not allow for easy e-banking. This must occur as a smooth and gradual process because of the greater ease and facility of such transactions. Disrupting currency transactions is a painful and ultimately much less effective way to push the population towards greater e-banking. It also disregards the point that this is not something people can just do at one stroke, and certainly not at this moment, when the pressures on banks are anyway so intense that they are in no condition to handle these new requests.

So what can be done to control black money?

It has been argued, with some justification, that this is a diversionary tactic, designed to draw attention away from the fact that – despite its fervent campaign promises – this government has so far done very little to deal with the problem of black money. As it happens, there is a lot it can do, relatively easily, if only it truly does have the necessary political will – and none of these measures would cause any hardship to the common people. In terms of preventing the generation of black money, what is required is a more effective, clean and accountable tax administration that uses all the information at its disposal to go after those who are evading the law in various ways. For companies, it is possible to identify practices such as over- or under-invoicing, false transactions and attempts to use loopholes in the laws. For individuals, it is now easily possible to uncover undisclosed incomes by tracking payments and following suspiciously large purchases, and put them under scrutiny. Obviously, movements of funds abroad is a major avenue, which needs to be monitored much more closely. Indeed, this is what most countries that are known to have relatively “clean” economic systems do as regular practice, without making a great song and dance about it.

In terms of dealing with the assets held from such undisclosed incomes, this too can be easily done if the government has a mind to do so. It is not just land deals and gold and jewellery purchases that can be monitored, precisely as the government is trying to do now in the middle of this cash crunch. The completely uncalled for possibility of making buying securities through “Participatory Notes” in the stock market, which do not require the buyer to reveal his/her identity, is an obvious means of parking illicit funds. These should obviously be done away with – yet both the previous UPA government and this supposedly anti-corruption BJP government have proved to be curiously reluctant to do so.

The most obvious thing to do – and the issue that Mr Modi continuously railed about in his electoral campaign speeches – is to go after those who have stashed away their undisclosed funds in bank accounts and other assets abroad. He had

promised to “bring back” all this money, to the point that many holders of Jan Dhan accounts today still fondly believe that they will each receive around Rs 15 lakh as their share of the returned money! Yet the Modi government has steadfastly refused even to divulge the names of such individuals, much less take any action against them. Other wilful defaulters are similarly being dealt with kid gloves. The facility with which the king of defaulters, Mr Vijay Mallya, was allowed to leave the country makes a mockery of the subsequent official noises made against him, which are made with the full knowledge that he will not be deported back to India by the UK. Overall, this ill-conceived and even more poorly executed move appears to be an attempt by the government to display a lot of sound and fury, but signifying very little. It is unfortunate that in the process it has inflicted such damage on ordinary people and on the economy.

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US Provocation and North Korea: Pretext for War with China

James Petras

US Empire building on a world-scale began during and shortly after WWII. Washington intervened directly in the Chinese civil war (providing arms to Chiang Kai Shek's army while the Red Army battled the Japanese), backed France's re-colonization war against the Viet Minh in Indo-China and installed Japanese imperial collaborator-puppet regimes in South Korea, Taiwan and Japan.

While empire building took place with starts and stops, advances and defeats, the strategic goal remained the same: to prevent the establishment of independent communist or secular-nationalist governments and to impose vassal regimes compliant to US interests. Bloody wars and coups ('regime changes') were the weapons of choice. Defeated European colonial regimes were replaced and incorporated as subordinate US allies. Where possible, Washington relied on armies of mercenaries trained, equipped and directed by US 'advisors' to advance imperial conquests. Where necessary, usually if the client regime and vassal troops were unable to defeat an armed people's army, the US armed forces intervened directly.

Imperial strategists sought to intervene and brutally conquer the target nation. When they failed to achieve their 'maximum' goal, they dug in with a policy of encirclement to cut the links between revolutionary centres with adjoining movements. Where countries successfully resisted armed conquests, empire builders imposed economic sanctions and blockades to erode the economic basis of popular governments. Empires, as the Roman sages long recognized, are not built in a day, or weeks and months. Temporary agreements and accords are signed and conveniently broken because imperial designs remain paramount. Empires would foment internal cleavages among adversaries and coups in neighbouring countries. Above all, they construct a worldwide network of military outposts, clandestine operatives and regional alliances on the borders of independent governments to

curtail emerging military powers. Following successful wars, imperial centres dominate production and markets, resources and labour. However, over time challenges would inevitably emerge from dependent and independent regimes. Rivals and competitors gained markets and increased military competence. While some vassal states sacrificed political-military sovereignty for independent economic development, others moved toward political independence.

Early and Late Contradictions of Expanding Imperialism

The dynamics of imperial states and systems contain contradictions that constantly challenge and change the contours of empire. The US devoted immense resources to retain its military supremacy among vassals, but experienced a sharp decline in its share of world markets, especially with the rapid rise of new economic producers. Economic competition forced the imperial centres to realign the focus of their economies - 'rent' (finance and speculation) displaced profits from trade and production. Imperial industries relocated abroad in search of cheap labour. Finance, insurance, real estate, communications, military and security industries came to dominate the domestic economy. A vicious cycle was created: with the erosion of its productive base, the Empire further increased its reliance on the military, finance capital and the import of cheap consumer goods.

Just after World War II, Washington tested its military prowess through intervention. Because of the immense popular resistance and the proximity of the USSR, and later PRC, empire building in post-colonial Asia was contained or militarily defeated. US forces temporarily recognized a stalemate in Korea after killing millions. Its defeat in China led to the flight of the 'Nationalists' to the provincial island of Taiwan. The sustained popular resistance and material support from socialist superpowers led to its retreat from Indo-China. In response, it resorted to economic sanctions to strangle the revolutionary governments.

The Growth of the Unipolar Ideology

With the growing power of overseas economic competitors and its increasing reliance on direct military intervention, the US Empire took advantage of the internal disintegration of the USSR and China's embrace of 'state capitalism' in the early 1990's and 1980s..The US expanded throughout the Baltic region, Eastern and Central Europe and the Balkans - with the forced breakup of Yugoslavia. Imperial strategists envisioned 'a unipolar empire' - an imperial state without rivals. The Empire builders were free to invade, occupy and pillage independent states on any continent - even bombing a European capital, Belgrade, with total impunity. Multiple wars were launched against designated 'adversaries', who lacked strong global allies.

Countries in South Asia, the Middle East and North Africa were targeted for destruction. South America was under the control of neo-liberal regimes. The former USSR was pillaged and disarmed by imperial vassals. Russia was ruled by gangster-kleptocrats allied to US stooges. China was envisioned as nothing more than a slave workshop producing cheap mass consumer goods for Americans and generating high profits for US multinational corporations and retailers like Walmart. Unlike the Roman Empire, the 1990's were not to be the prelude to an unchallenged US empire of long duration. Since the 'unipolarists' were pursuing multiple costly and destructive wars of conquest and they were unable to rely on the growth of satellites with emerging industrial economies for its profits. US global power eroded.

The Demise of Unipolarity: The 21st Century

Ten years into the 21st century, the imperial vision of an unchallenged unipolar empire was crumbling. China's 'primitive' accumulation led to advanced domestic accumulation for the Chinese people and state. China's power expanded overseas through investments, trade and acquisitions. China displaced the US as the leading trading partner in Asia and the largest importer of primary commodities from Latin America and Africa. China became the world's leading manufacturer and exporter of consumer goods to North America and the EU. The first decade of the 21st century witnessed the overthrow or defeat of US vassal states throughout Latin America (Argentina, Bolivia, Venezuela, Ecuador and Brazil) and the emergence of independent agro-mineral regimes poised to form regional trade pacts. This was a period of growing global demand for their natural resources and commodities—precisely when the US was de-industrializing and in the throes of costly disastrous wars in the Middle East.

In contrast to the growing independence of Latin America, the EU deepened its military participation in the brutal US-led overseas wars by expanding the 'mandate' of NATO. Brussels followed the unipolarist policy of systematically encircling Russia and weakening its independence via harsh sanctions. The EU's outward expansion (financed with increasing domestic austerity) heightened internal cleavages, leading to popular discontent. The UK voted in favour of a referendum to secede from the EU.

The domestic disasters of the US vassal regime in Russia, under Boris Yeltsin during the 1990's, pushed the voters to elect a nationalist, Vladimir Putin. President Vladimir Putin's government embarked on a program to regain Russian sovereignty and its position as a global power, countering US internal intervention and pushing back against external encirclement by NATO. Unipolarists continued to launch multiple wars of conquest in the Middle East, North Africa and South

Asia, costing trillions of dollars and leading to the loss of global markets and competitiveness. As the armies of the Empire expanded globally, the domestic economy (the 'Republic') contracted. The US became mired in recession and growing poverty. Unipolar politics created a growing multi-polar global economy, while rigidly imposing military priorities.

The Empire Strikes Back: The Nuclear Option

The second decade of the 21st century ushered in the demise of unipolarity to the dismay of many 'experts' and the blind denial by its political architects. The rise of a multi-polar world economy intensified the desperate imperial drive to restore unipolarity by military means, led by militarists incapable of adjusting or assessing their own policies. Under the regime of the 'first black' US President Obama, elected on promises to 'rein in' the military, imperial policymakers intensified their pursuit of seven, new and continuing wars. To the policymakers and the propagandists in the US-EU corporate media, these were successful imperial wars, accompanied by premature declarations of victories in Somalia, Iraq and Afghanistan. This triumphal delusion of success led the new Administration to launch new wars in Ukraine, Libya, Syria and Yemen.

As the new wave of wars and coups ('regime change') to re-impose unipolarity failed, even greater militarist policies displaced economic strategies for global dominance. The unipolarists-militarists, who direct the permanent state apparatus, continued to sacrifice markets and investments with total immunity from the disastrous consequences of their failures on the domestic economy.

A Brief Revival of Unipolarity in Latin America

Coups and power grabs have overturned independent governments in Argentina, Brazil, Paraguay, Honduras and threatened progressive governments in Bolivia, Venezuela and Ecuador. However, the pro-imperial 'roll-back' in Latin America was neither politically nor economically sustainable and threatens to undermine any restoration of US unipolar dominance of the region.

The US has provided no economic aid or expanded access to markets to reward and support their newly acquired client regimes. Argentina's new vassal, Mauricio Macri, transferred billions of dollars to predatory Wall Street bankers and handed over access to military bases and lucrative resources without receiving any reciprocal inflows of investment capital. Indeed the servile policies of President Macri created greater unemployment and depressed living standards, leading to mass popular discontent. The unipolar empire's 'new boy' in its Buenos Aires fiefdom faces an early demise.

Likewise, widespread corruption, a deep economic depression and unprecedented double digit levels of unemployment in Brazil threaten the illicit vassal regime of Michel Temer with permanent crisis and rising class conflict.

Short-Lived Success in the Middle East

The revanchist unipolarist launch of a new wave of wars in the Middle East and North Africa seemed to succeed briefly with the devastating power of US-NATO aerial and naval bombardment. Then collapsed amidst grotesque destruction and chaos, flooding Europe with millions of refugees. Powerful surges of resistance to the US invasion of Iraq and Afghanistan hastened the retreat toward a multi-polar world. Islamist insurgents drove the US into fortress garrisons and took control of the countryside and encircled cities in Afghanistan; Iraq, Syria, Yemen, Somalia and Libya drove US backed regimes and mercenaries into flight.

Unipolarists and the Permanent State: Re-Group and Attack

Faced with its failures, unipolarists regrouped and implemented the most dangerous military strategy yet: the build-up of nuclear 'First-Strike' capability targeting China and Russia. Orchestrated by US State Department political appointees, Ukraine's government was taken over by US vassals leading to the ongoing break-up of that country. Fearful of neo-fascists and Russophobes, the citizens of Crimea voted to rejoin Russia. Ethnic Russian majorities in Ukraine's Donbass region have been at war with Kiev with thousands killed and millions fleeing their homes to take refuge in Russia. The unipolarists in Washington financed and directed the Kiev coup led by kleptocrats, fascists and street mobs, immune as always from the consequences.

Meanwhile the US is increasing its number of combat troops in Afghanistan, Iraq and Syria to buttress its unreliable allies and mercenaries. What is crucial to understanding the rise and demise of imperial power and the euphoric unipolar declarations of the 1990's (especially during the heyday of President Clinton's bloody reign), is that at no point have military and political advances been sustained by foundational economic building blocks. The US defeated and subsequently occupied Iraq, but it also systematically destroyed Iraq's civil society and its economy, creating fertile ground for massive ethnic cleansing, waves of refugees and the subsequent Islamist uprising that over ran vast territories. Indeed, deliberate US policies in Iraq and elsewhere created the refugee crisis that is overwhelming Europe.

A similar situation is occurring during the first two decades of this century: Military victories have installed ineffective imperial-backed unpopular leaders. Unipolarists increasingly rely on the most retrograde tribal rabble, Islamist

extremists, overseas clients and paid mercenaries. The deliberate US-led assault on the very people capable of leading modern multicultural nations like Iraq, Libya, Syria and Ukraine, is a caricature of the notorious Pol Pot assaults on Cambodia's educated classes. Of course, the US honed its special skills in 'killing the school teachers' when it trained and financed the mujahedin in Afghanistan in the 1980's. The second weakness, which led to the collapse of the unipolar illusion, has been their inability to rethink their assumptions and re-orient and rebalance their strategic militarist paradigm from the incredible global mess they created

They steadfastly refused to work with and promote the educated economic elites in the conquered countries. To do so would have required maintaining an intact social-economic-security system in the countries they had systematically shredded. It would mean rejecting their paradigm of total war, unconditional surrender and naked, brutal military occupation in order to allow the development of viable economic allies, instead of imposing pliable but grotesquely corrupt vassal regimes.

The deeply entrenched, heavily financed and vast military-intelligence-police apparatus, numbering many millions, has formed a parallel imperial state ruling over the elected and civilian regime within the US. The so-called 'deep state', in reality, is a ruling state run by unipolarists. It is not some 'faceless entity': It has a class, ideological and economic identity. Despite the severe cost of losing a series of catastrophic wars and the multi-billion-dollar thefts by kleptocratic vassal regimes, the unipolarists have remained intact, even increasing their efforts to score a conquest or temporary military victory.

Let us say it, openly and clearly: The unipolarists are now engaged in blaming their terrible military and political failures on Russia and China. This is why they seek, directly and indirectly, to weaken Russia and China's 'allies abroad' and at home. Indeed their savage campaign to 'blame the Russians' for President Trump's election reflects their deep hostility to Russia and contempt for the working and lower middle class voters (the 'basket of deplorables') who voted for Trump. This elite's inability to examine its own failures and the political system's inability to remove these disastrous policymakers is a serious threat to the future of the world.

Unipolarists: Fabricating Pretexts for World War

While the unipolarist state suffered predictable military defeats and prolonged wars and reliance on unstable civilian regimes, the ideologues continue to deflect blame onto 'Russia and China as the source of all their military defeats'. The unipolarists' monomania has been transformed into a provocative large-scale offensive nuclear missile build-up in Europe and Asia, increasing the risk of a nuclear war by engaging in a deadly 'game of chicken.'

The veteran nuclear physicists in the Bulletin of the Atomic Scientists published an important description of the unipolarists' war plans. They revealed that the 'current and ongoing US nuclear program has implemented revolutionary new technologies that will vastly increase the targeting capability of the US ballistic missile arsenal. These new technologies increase the overall US killing power of existing US ballistic missile forces threefold'. This is exactly what an objective observer would expect of a nuclear-armed US unipolar state planning to launch a war by disarming China and Russia with a 'surprise' first strike.

The unipolar state has targeted several countries as pretexts for launching a war. The US government installed provocative missile bases in the Baltic countries and Poland. These are regimes chosen for their eagerness to violate Russia's borders or airspace and insanely willing to invite the inevitable military response and chain reaction onto their own populations. Other sites for huge US military bases and NATO expansion include the Balkans, especially the former Yugoslav provinces of Kosovo and Montenegro. These are bankrupt ethno-fascist mafia states and potential tinderboxes for NATO-provoked conflicts leading to a US first strike. This explains why the most rabid US Senate militarists have been pushing for Kosovo and Montenegro's integration into NATO.

Syria is where the unipolarists are creating a pretext for nuclear war. The US state has been sending more 'Special Forces' into highly conflictive areas to support their mercenary allies. This means US troops will operate (illegally) face-to-face with the advancing Syrian army, who are backed by Russian military air support (legally). The US plans to seize ISIS-controlled Raqqa in Northern Syria as its own base of operation with the intention of denying the Syrian government its victory over the jihadi-terrorists. The likelihood of armed 'incidents' between the US and Russia in Syria is growing to the rapturous applause of US unipolarists.

The US has financed and promoted Kurdish fighters as they seize Syrian territory from the jihadi-terrorists, especially in territories along the Turkish border. This is leading to an inevitable conflict between Turkey and the US-backed Kurds.

Another likely site for expanded war is Ukraine. After seizing power in Kiev, the klepto-fascists launched a shooting war and economic blockade against the bilingual ethnic Russian-Ukrainians of the Donbass region. Attacks by the Kiev junta, countless massacres of civilians (including the burning of scores of unarmed Russian-speaking protesters in Odessa) and the sabotage of Russian humanitarian aid shipments could provoke retaliation from Russia and invite a US military intervention via the Black Sea against Crimea.

The mostly likely site for starting World War III is the Korean peninsula. The unipolarists and their allies in the state apparatus have systematically built-up

the conditions to trigger a war with China using the pretext of the North Korean defensive weapons program.

The unipolarists' state apparatus has gathered its allies in Congress and the mass media to create public hysteria. Congress and the administration of President Trump have fabricated the North Korean missile program as a 'threat to the United States'. This has allowed the unipolarist state to implement an offensive military strategy to counter this phony 'threat'.

The elite have discarded all previous diplomatic negotiations and agreements with North Korea in order to prepare for war - ultimately directed at China. This is because China is the most dynamic and successful global economic challenger to US world domination. The US has 'suffered' peaceful, but humiliating, economic defeat at the hands of an emerging Asian power. China's economy has grown more than three times faster than the US for the last two decades. And China's infrastructure development bank has attracted scores of regional and European participants after a much promoted US trade agreement in Asia, developed by the Obama Administration, collapsed. Over the past decade, while salaries and wages have stagnated or regressed in the US and EU, they have tripled in China.

China's economic growth is set to surpass the US into the near and distant future if trends continue. This will inevitably lead to China replacing the US as the world's most dynamic economic power.... barring a nuclear attack by the US. It is no wonder China is embarked on a program to modernize its defensive missile systems and border and maritime security.

As the unipolarists prepare for the 'final decision' to attack China, they are systematically installing their most advanced nuclear missile strike capacity in South Korea under the preposterous pretext of countering the regime in Pyongyang. To exacerbate tensions, the US High Command has embarked on cyber-attacks against North Korea's missile program. It has been staging massive military exercises with Seoul, which provoked the North Korean military to 'test' four of its medium range ballistic missiles in the Sea of Japan. Washington has ignored the Chinese government's efforts to calm the situation and persuade the North Koreans to resist US provocations on its borders and even scale down their nuclear weapons program.

The US war propaganda machine claims that Pyongyang's nervous response to Washington's provocative military exercises (dubbed "Fool Eagle") on North Korea's border are both a 'threat' to South Korea and 'evidence of its leaders' insanity.' Ultimately, Washington intends to target China. It installed its (misnamed) Terminal High Altitude Area Defense System (THAAD) in South Korea. An offensive surveillance and attack system designed to target China's major

cities and complement the US maritime encirclement of China and Russia. Using North Korea as a pretext, THAAD was installed in South Korea, with the capacity to reach the Chinese heartland in minutes. Its range covers over 3,000 kilometers of China's land mass. THAAD directed missiles are specifically designed to identify and destroy China's defensive missile capacity.

With the THAAD installation in South Korea, Russia's Far East is now encircled by the US offensive missiles to complement the build-up in the West. The unipolar strategists are joined by the increasingly militaristic Japanese government - a most alarming development for the Koreans and Chinese given the history of Japanese brutality in the region. The Japanese Defence Minister has proposed acquiring the capacity for a 'pre-emptive strike', an imperial replay of its invasion and enslavement of Korea and Manchuria. Japan 'points to' North Korea but really aims at China.

South Korea's deeply corrupt and blindly submissive regime immediately accepted the US/THAAD system on their territory. Washington found the compliant South Korean 'deep state' willing to sacrifice its crucial economic links with Beijing: China is South Korea's biggest trading partner. In exchange for serving as a platform for future US aggression against China, South Korea has suffered losses in trade, investments and employment. Even if a new South Korea government were to reverse this policy, the US will not move its THAAD installation. China, for its part, has largely cut its economic and investment ties with some of South Korea's biggest conglomerates. Tourism, cultural and academic exchanges, commercial agreements and, most important, most of South Korean industrial exports face shut down.

In the midst of a major political scandal involving the Korean President (who faces impeachment and imprisonment), the US-Japanese military alliance has brutally sucked the hapless South Korean people into an offensive military build-up against China. In the process Seoul threatens its peaceful economic relations with China. The South Koreans are overwhelmingly 'pro-peace', but find themselves on the frontlines of a potential nuclear war.

China's response to Washington's threat is a massive buildup of its own defensive missile capacity. The Chinese now claim to have the capacity to rapidly demolish THAAD bases in South Korea if pushed by the US. China is retooling its factories to compensate for the loss of South Korean industrial imports.

Conclusion

The rise and fall of unipolar America has not displaced the permanent state apparatus as it continues to pursue its deluded strategies. On the contrary, the

unipolarists are accelerating their drive for global military conquest by targeting Russia and China, which they insist are the cause of their losing wars and global economic decline. They live on their delusions of a 'Golden Age' of the 1990's when George Bush, Sr. could devastate Iraq and Bill Clinton could bomb Yugoslavia's cities with impunity. Gone are the days when the unipolarists could break up the USSR, finance violent breakaway former Soviet regimes in Asia and the Caucasus and run fraudulent elections for its drunken clients in Russia.

The disasters of US policies and its domestic economic decline has given way to rapid and profound changes in power relations over the last two decades, shattering any illusion of a unipolar 'American Century.' Unipolarity remains the ideology of the permanent state security apparatus and its elites in Washington. They believe that the marriage of militarism abroad and financial control at home will allow them to regain their lost unipolar 'Garden of Eden'. China and Russia are the essential new protagonists of a multipolar world. The dynamics of necessity and their own economic growth has pushed them to successfully nurture alternative, independent states and markets. This obvious, irreversible reality has driven the unipolarists to the mania of preparing for a global nuclear war! The pretexts are infinite and absurd; the targets are clear and global; the destructive offensive military means are available; but so are the formidable defensive and retaliatory capacities of China and Russia. The unipolarist state's delusion of 'winning a global nuclear war' presents Americans with the critical challenge to resist or give in to an insanely dangerous empire in decline, which is willing to launch a globally destructive war.

(c) James Petras

Cultural and Economic Linkages in India-China Relations in Contemporary Times: The Role of Borderland Regions

S Shaji

India and China share their relations for the last several millennia through its intense ties in cultural, economic and political realms. In fact, two countries, representing two greatest civilizations in the world has had highly intricate and intense relations with several twists and turns in its long trajectory; the essence of which can be deciphered even in contemporary times. This paper tries to locate India-China relations in the present times by focusing on the role of borderland communities and regions in shaping the relations, especially in the realm of culture and the economy (the focus is primarily on Sikkim, an Indian state, which is considered as the new meeting point between India and China in the realm of economy and culture). The paper is organised in the following manner: the first part of the paper provides an overview of the evolution of India-China relations in a historical setting. Second part of the article analyses, briefly, the general trends in foreign economic policies of India and China in the contemporary times. The third and the final part specifically discusses the contemporary trends with respect to culture and economy, especially centering on Indian and Chinese border land communities and regions with special reference to Sikkim and Nathu La pass.¹

India -China relations: An Overview

India and China share a border of around 3500 kilometres between them. In fact, these two Asian giants representing two old civilizations in the world have had very intense and dynamic linkages which date back to the ancient period. India's relations with China after its independence have gone through several phases. It had cordial relations during late 1940s and 1950s which culminated in the signing of 'Panchasheel' (Five Principles of Peaceful Co-existence) in 1954. Both the states in their postcolonial phase began to emerge as the leaders of Afro-Asian world by supporting each other. They were equally instrumental in bringing countries

from the Afro-Asian world on a common platform at Bandung Conference in 1954 which initiated the processes of building 'Third World Solidarity' and 'South-South Cooperation'. According to John W. Graver, this was the period of 'accommodation and partnership' (Garver 2010). In fact, the political leadership in both the countries perceived a cooperative environment. For instance, Indian Prime Minister Jawaharlal Nehru perceived a 'Joint Sino-Indian leadership of Asia' (Malik 2009), as reflected in popular phrase in India called 'Hindi-Chini Bhai-Bhai'. Towards the end of 1950s, such a partnership got strained and collapsed over the issue of 'Tibet' and 'Border dispute' which in turn culminated in a war in 1962. China under Zhou Enlai refused to recognise McMahon Line, the boundary line which demarcated India and China. Subsequently, several border clashes were witnessed between India and China in 1960s and this was followed by a 'Cold Peace.'² Such a 'Cold Peace' after the war ran into late seventies. However, the relationship got a fillip towards the end of seventies. During this period, both the countries were witnessing intense political upheavals in their domestic arenas as China was going through Cultural Revolution and India was facing political uncertainties. In late Seventies, the relations between India and China began to shift as both the countries had regime changes with Deng Xiaoping emerging as China's leader and Moraji Desai, a non-Congress leader, becoming India's Prime Minister. From mid-Eighties, there were serious efforts to reconcile with each other. Prime Minister Rajiv Gandhi's visit in 1988 to China marked a shift in the relations between two countries and subsequently, a near total normalcy was attained. From Nineties, the ties between India China entered into a new phase with more tangible linkages and the alliances as the period witnessed rapid changes at the global level such as the end of Cold War and dismantling of systemic level binaries of ideology, economy and political systems.

In the post-Cold War period, India's relations with China improved drastically, which resulted in the signing of several agreements and treaties. For instance, both the countries signed in 1993, Agreement on the Maintenance of Peace and Tranquility along the Line of Actual Control (LAC) in the India-China border area. In 1996, they went on to sign an Agreement on Confidence Building Measures (CBMs) in the military field along the Line of Actual Control in the India-China Border Areas (Karaeckattu 2003). Similarly, they signed an important Agreement in 2005- Agreement on 'Political Parameters and Guiding Principles for the Settlement of the India-China Boundary Question'. Several rounds of talks between designated representatives for negotiations on the border issue were held till 2015 (around fifteen).

Such intense engagements between both the states resulted in a dramatic expansion of trade between India and China, which in turn provided a stabilising

element that had not existed in the past. Starting from a few hundred million dollars in the mid-1990s, bilateral trade touched \$7.5 billion in the year 2003 (Mohan 2004). In June 2003, when the then Prime Minister Atal Behari Vajpayee was in China on a State visit, India entered into several Agreements; among many others, the most important was related to border trade through Sikkim (during this visit nine agreements were signed with China).

Clubbed with India's overall commerce with Hong Kong and Taiwan, Greater China today has become India's third largest trading partner. Though Sino-Indian trade has many structural limitations, it has not showed any sign of slowing down and continues to grow rapidly. In general, both the states continue to keep their relations going in terms of trade cooperation in such a way that occasional frictions do not result in breakdown in the region while they are involved in new initiatives where they cooperate in trans-regional energy. The national oil companies of India and China today bid for equity oil all around the world and occasionally find themselves in the same consortium, for instance, in Sudan (Mohan 2004). India and China signed Cultural Exchange Programme (CEP) in 2011 for a close linkage among various professionals and people.³ Besides, India and China also signed around fifty agreements when Prime Minister Narendra Modi visited China in 2015. In the beginning of this decade, China has emerged as India's leading trade partner which also result in widening trade deficit, unfavourable to India. India's trade deficit with China increased to USD 37.8 billion in 2012 whereas bilateral trade stood at USD 65.85 billion in 2013-14.⁴ There were some of the issues pertaining to the market access of Indian agricultural products which India wants to take up with China in future negotiations. In fact, the current trends in Indo-China relations need to be broadly located in general settings of foreign economic policies of India and China in the period economic reforms since the end of Cold War.

Foreign Economic Policies of India and China in Post-Cold War period

In the contemporary architecture of global power politics, shaped by the new emerging geo-political/economic landscape, India and China are trying to locate themselves to ensure a position of advantage in their respective regions and beyond. There are several systemic (international) and domestic (national) factors that fashion the shaping of foreign economic policies of India and China in the recent times which allow them to attain this. At the systemic (international) level, by the last decade of Twentieth century, the process of globalisation of markets and marketisation of economies under the tutelage of the United States (US) attained paramount position across the world. Thanks to supra-national integration of production the Multi-national and transnational Corporations (MNCs and

TNCs) along with the free flow of Foreign Direct Investments (FDI), prominently in knowledge based sectors, has created a vibrant service sector economy across the world. In a way, the operation of capital markets, money and foreign private investment, and so forth has rendered the entire globe virtually borderless (Shaji 2007). Marketisation of economies and globalisation of markets have become the new mantras in the period of the ascendancy of neo-liberal globalisation (Babu 1998).⁵ Furthermore, the disintegration of the socialist bloc at the international level and the apparent victory of capitalism following the demise of Cold War has redefined and reshaped foreign policies of nation states across the world. Both India and China have adopted foreign and economic policies, in tune with changes at the global level.

As far as India is concerned, at the domestic level, shortcomings of planned economy, non-performance of public sector units, high rate of corruption, and lack of sufficient foreign reserves began to shake the very foundation of planned economy in the beginning of nineties. During that period, there emerged serious challenges to self-reliance and the import substitution-oriented economic policy as well as strategies (Shaji 2007). Innumerable problems began to weaken the state of the economy in India. Primarily, the problem of resource mobilisation from outside became more pressing by the late Eighties. Despite better sophistication in debt management, the Government of India found it increasingly difficult to raise money in the late Eighties on favourable terms. The state of the economy worsened and became more chaotic in the nineties. Postponement of 1991-92 budget presentations, balance of payment crisis and a huge rate of fiscal deficit were some indicators of the worsening economic situation in the country.

These international and domestic factors became major catalysts to launch New Economic policy (NEP). The policy envisaged vast scope for market in the economic activities of the nation, along with the public sector. The new economic policy which was introduced during the coalition government led by P.V. Narasimha Rao (1991-1996) began to reshape the foreign policy of the country in an implicit fashion, though certain terminologies such as 'non-alignment', 'third world solidarity' continued to be in use in official parlance (Mohan 2004). India was ushered into market economy by opening up its economy in a big way in the early in 1990s, which in turn has made the state to recede from commanding heights of the economy like never before.

Several steps such as letting of FDI, relaxing the license Raj, disinvestment of public sector units (thereby privatising service delivery), regulatory reforms in telecom, power, port, petroleum sectors were undertaken by India to integrate with the global economy. In sum, India's foreign economic policy discourse began to focus on certain strategies to attract technology and Foreign Direct Investment

(FDI) in the period of economic reforms, unleashed by the forces of globalisation (Shaji 2007).

Concurrently, since the end of Cold War, at the international level, there was an increasing power struggle between developed and developing countries vis-à-vis Foreign Direct Investment (FDI) including technology, both explicitly and implicitly. Its reflections can be seen in the formation of a hegemonic alliance/order of transnational capitalist classes, concentrated in the developed states. Consent rather than coercion primarily characterises the relations between the state and civil society in a hegemonic order. The reforms India undertook led to emphasis on economic aspects than political in the realm of foreign policy. Alongside, while new alliances were forged, new found dynamism of regional groupings and strengthening of traditional alliances also took shape (Mohan 2003). There is contending perception among policy makers that the link between India's domestic policy and external relations has to be constantly reworked, with the reforms underway. Consequently, India had to engage with several states to survive in the changing international order. This process was warranted because of India's need for technology, finance and capital to meet domestic demands. Against this setting, a dominant regional and middle level power such as India has been trying to play proactive role in persuading other like-minded developing states through diverse networks of development cooperation, which include transfer of technology and trade. In this context, new regions such as Africa, along with South East Asia and China, are incontestably important market destinations where India wanted to build its new trade relations. Thus, from early nineties onwards, India started opening of new ties with countries such as China. In addition, such linkages were also serious attempts to reconcile with estranged powers like China. Along with strong trade and strategic interactions, India started employing its soft power⁶ in an unprecedented manner.

On the other end, in the realm of initiating economic reforms, China was ahead of India by a decade. China liberalised its economy much earlier by opening its door for FDI (in the late 70s), which has been labelled as 'market socialism'. China, a leading socialist state, introduced economic restructuring as a package called 'Post-Mao Reforms' in the 1980s and embraced market economy in a big way in the 1990s. Interestingly, the manufacturing sector achieved substantial momentum in China (whereas India has been focussing more on service sector). Pragmatism became the catchword in China's economic policy which necessitated changes in its foreign policy, so as to reach out to new nations for acquiring natural resources such as oil and minerals and new markets for its finished products. In fact, China is in the process of seeking new markets for its export driven-economy-now world's second largest⁷. In addition, China wants unimpeded, even exclusive access to abundant

natural resources from diverse regions such as Africa, Central Asia, especially in the sphere of oil.⁸ Similarly, improving relations with its neighbours and regions as well as finding new destinations in faraway places for its market and acquisition of natural resources find resonance in the foreign policy of China. In this context, it has had to prioritise the initiation of durable relations with countries like India though it has had political conflicts in the past.

Therefore, the search for resources and market became prime focus of Chinese foreign policy in the 1980s, as evident from their focus on developing countries as the sources of natural resources such as oil for attaining energy security and finding market for its finished products. China, like in the case of India, has been adopting various elements of hard power (primarily) economy and soft power (civilizational and cultural aspects) to further its ties with various countries and regions. In the process, China began to expand its ties with India and other states in its neighbouring territories like never before.

Thus, India and China were linked into wide ranging relations in the Post-Cold War period due to diverse sets of factors emanated from systemic, domestic arenas. Economy and cultural issues figured prominently in such linkages and associations. In the economic front, the search for market and energy compelled these two states to freeze their political conflicts and build durable ties while cultural aspects were priorities to strengthen the ongoing fledging economic settings. To operationalise changing relations, India and China have been attempting to discover new meeting points, both at tangible and intangible levels. Border trade and interactions have become new medium of linkages between these two states. Furthermore, the geographic meeting points such as mountain passes and location were being identified to link both the countries and the role of borderland communities were highlighted. With this perspective, an Indian state, Sikkim began to figure prominently as the priority meeting point as such localities had the history of connecting people and regions through economic and cultural ties in the past. Against the backdrop of this discussion, the next section analyses the role of borderland regions in operationalizing India-China relations. The section discusses in detail the role that Sikkim plays in general and Nathu La pass in particular in promoting Indo-China Relation in the contemporary period.

Sikkim: A Borderland Region in Indo-China relations

Sikkim was integrated in 1975 as 22nd state of the Indian Union. For a long time, Sikkim was a small independent Kingdom between India and China during the colonial period and also a protectorate of India in India's postcolonial phase which faced enormous degree of existential uncertainty, especially after India attained Independence. Though earlier China refused to recognise Sikkim as an

integral part of India, the former later came around to accept Sikkim as an integral part of India during Chinese Premier Wen Jiabo's visit to India in 2005. China always used to treat Sikkim as an independent State. There is a perception among a few scholars that Chinese recognition of Sikkim as part of Indian Union was in lieu of India's recognition of Tibetan Autonomous Region (TAR) as an integral part of China (Dutta 2008). The Chinese leadership (through Premier Wen Jiabo) stated that Sikkim is an integral part of India and was no longer a border dispute between India and China (Chopra 2006). Wen Jiabo, in fact, handed over a new Chinese map depicting Sikkim within India's international boundary. Such recognition on the part of China provided an opportunity to expand Indian influence in the Tibetan region, which in a way helped India to explore opportunities to revive the old Silk route. A mountain pass such as Nathu La is very important as it served as the gateway in spreading commerce and culture as evident from the spread of Buddhism from India to East Asia during the time when Silk Route was in vogue in the ancient period. In fact, unlike other bordering regions and spots in India such as Arunachal Pradesh and Aksai Chin, there is no controversy over well demarcated boundary line between India and China. It is also possible to spread India's tourism and soft power into Tibetan region through Sikkim. A few scholars are of the view that the reopening of Nathu La in India's China policy may be an apt example of how trade and tourism resolve tensions. The growing interdependency of both the countries through the pass may lead to desecuritization and demilitarization (Chaudhury & Saha 2015). Therefore, Nathu La pass assumes greater significance in promoting economic and cultural ties between India and China in contemporary times.

Nathu La Pass in India-China relations

After the then Prime Minister of India, A.B. Vajpayee's visit to China in 2003, both countries agreed to resume trade through Nathu La. The significance of this step lay in China's implicit recognition of Sikkim's merger with India - a fact that Beijing had consistently refused to accept earlier. On 23 June 2003, Vajpayee and Wen Jiabao signed the declaration of principles for relations and comprehensive cooperation between China and India (Xinhua 2003) including the memorandum on expanding border trade that provided for the formal reopening of Nathu La as a border trade pass between Indian and China.

China and India has recently launched cross- border travel to facilitate visit topilgrim places such as Manasarovar and Kailas, important places of worship for both the Hindu and Buddhistpilgrims.It has been a major step and progress in the evolution of relations between India and China. For a long period of time, people in India, especially pilgrims to Kailas have been demanding such an initiative

from both the countries. Pilgrim visits have been agreed to during the meeting between Chinese president Xi Jinping with India's Prime Minister Mr. Narendra Modi (Panda 2015). Subsequently, China opened Nathu La Pass in Sikkim in order to make Indians, mostly pilgrims,⁹ visit Manasarovar- Kailas,¹⁰ an important pilgrim place for Indians. This is the second mountain pass China opened in the recent times after the opening of Lipulekh Pass in Uttarakhand in India which was badly damaged due to the floods in 2013. In fact, the opening of the pass reduces the travel days to Manasarovar from fifteen days to two. The opening of the Nathu La, the symbol of Indian and Chinese cultural space would go a long way in strengthening cultural and economic ties.¹¹ According to Le Yucheng, the then Chinese Ambassador to India, the opening of Nathu La would be an 'opportunity to strengthen strategic mutual trust between China and India, expand cooperation in all fields, promote people-to-people and cultural exchanges, properly handle our divergences, boost common development, and take the bilateral relations of our two countries to a new historical level'.¹² The statement reflects the emerging confidence among Chinese Policy makers on border exchanges. In the last decade itself, Tibet received around 80000 Indian pilgrims (the pilgrimage to Tibet started from 1981 onwards).¹³ Religion bonds people from North Eastern states of India, especially Sikkim with different sects of Tibetan Buddhists. For instance, believers of Kagyu sect of Buddhism dominate Sikkim, which is also a major sect in the Tibetan region. Taking note of such a bonding, Tibetan Government has been facilitating Indo-China contacts in a substantial manner. For instance, in order to make the journey possible between India and Tibetan region of China, Government of Tibetan Autonomous Region has made extensive arrangements such as constructing new roads, hotels, training translators and so on.¹⁴ In sum, there has been a positive orientation in China's attitude towards India in the realm of cultural aspects. From the Indian side, India had started border trade between India and China through Nathu La Pass in Sikkim which began in July 2006. In general, Nathu La is one of three trading posts in Indo-China border; the other two are Shipkila in Himachal Pradesh and Lipulekh (or Lipulech) in Uttarakhand. Similarly, it is one of the four official meeting points of military personnel between the Indian Army and the People's Liberation Army of China for regular consultations and interactions (Chaudhury & Saha 2015). It has to be noted that the pass is located at a strategic point in the Old Silk Route which has been traversed by the Chinese travellers such as FaHien, and the monk, Hiuen Tsang, in the fifth and sixth centuries, respectively. Thus, it was not just silk and goods that have been traded through this route but also culture and religion (Chaudhury & Saha 2015). In a way, the current efforts are aimed at reviving these contacts and exchanges of the past through the opening of Nathu La. In other words, India's attempt to link with China

(Tibetan region) through Sikkim is also part of India's 'Buddhist Diplomacy',¹⁵ a new term in India's foreign policy discourse.

At the economic front, at Nathu La pass, several agricultural products are exempted from duty for export to Tibetan region of China while mostly animal products and metals are exempted from duty for import from China to India. Around 40 items are completely exempted from levying of duty. Mostly, border trade is allowed for three to four months in a year.¹⁶ In fact, India had relaxed the norms for the border trade ahead of Prime Minister Narendra Modi's visit to China in May 2015. For border trade between India and China, according to the Director General of Foreign Trade, Government of India, Cost Insurance and Freight (CIF) value per consignment increased from Rs. 1,00,000 to Rs 2,00,000 in case of Nathu La, while for Gunji and Namgya Shipkila (the other border trade points), the existing CIF value limit of Rs 25,000 was increased to Rs 1,00,000.¹⁷

India for the consecutive second year (in 2014) conducted Sherathang trade mart, about five kilometers down the border outpost at Nathu La in India in which mostly agricultural products were traded. Similarly, on the other side of the border, Renqinggang trade mart is another major activity promoting cross border trade between two countries.¹⁸ Payments are made in Rupee by Indian traders and in Yuan by the Chinese traders. Similarly, Indians can visit the pass on Wednesdays, Thursdays, Saturdays and Sundays while Tibetans are allowed to visit Rumtek Monastery, an important pilgrim place for Tibetan Buddhists. There are some infrastructural issues in the opening of Nathu La pass between India and China for achieving maximum benefits. For instance, roads in Sikkim are inadequate and ill maintained. There is connectivity to the nearest port in the region-Kolkata (Singh 2015). These issues point to the direction that, though the trade and other interactions improved, infrastructural issues need to be addressed in order to speed up the economic and cultural interactions between the countries.

Exports and imports between India and China through border trading points include list of 29 items for export and from India list of 15 items for import from China. The products of export and import include agricultural implements, blankets, copper products, clothes, cycles, coffee, tea, barley, rice, flour, dry fruits, dry and fresh vegetables, vegetable oil, gur and misri, tobacco, snuff, spices, shoes, kerosene oil, stationary, utensils, wheat, liquor, milk processed products, canned food, cigarettes, local herbs, palm oil, hardware, goat skin, sheep skin, wool, raw silk, yak tail, yak hair, china clay, borax, seabelype, butter, goat Kashmiri, common salt, horse, goat, sheep.¹⁹ A study conducted at the beginning of this decade projected that (The Nathu La study group) the trade through the pass would be close to Rs 12,203 crores by 2015 on the higher side, and Rs 450 crores on the lower side.²⁰ All these point towards a positive picture about prospective intense

and dynamic linkages between India and China by way of border exchanges which include economic and cultural realms.

However, there are several grievances regarding practical issues of Indo-China trade through Nathu La Pass. For instance, some scholars are of the opinion that in terms of modalities of trade, border trade markets only remain open from Monday to Thursday every week (four days) from 7:30 am to 3:30 pm (India time) and from 10 am to 6 pm (Chinese time). The arrangement is neither an efficient one as the distance to be travelled on either side by the traders to reach the designated trade marts, and the paperwork involved, at times leaves limited time to trade and return, and nor there exists authorisation for overnight stay in either territory. There is also a permit fee of Rs. 50 for every vehicle entering Sikkim from China, and likewise a fee of 5 Yuan for every vehicle crossing over to the Chinese side up to the trade mart at Renqinggang.

Concluding Remarks

Since early nineties, India and China under the architecture of emerging international order of Post-Cold War period which is characterised by the ascendancy of globalisation began to refashion their economic and foreign policies. Such a refashioning resulted in increased linkage with neighbours, regions and distant destinations in the realm of foreign policy and liberalised and market oriented open economic structuring in the realm of the economy. In the relations between neighbours as in the case of India and China, border regions and communities started playing a positive role like never before. Sikkim in general and Nathu La pass in particular has emerged as a new meeting point in Indo-China border exchanges as reflected from increasing trade and cultural interfaces. Historical linkages, civilisational bonding and new policy initiatives on the part of India and China has the potential to take the border exchanges manifested through Sikkim and Nathu La pass to high level of economic and cultural ties between India and China.

Notes

- 1 This article does not analyse recent developments that have come up in India-Chinese relations (broadly since 2016).
- 2 'Cold Peace' broadly implies a relative peace which prevail between two States through atreaty/agreement following a war.
- 3 Information provided in the website of Ministry of External Affairs, Government of India http://www.mea.gov.in/Portal/ForeignRelation/China_Brief.pdf (accessed on September 1, 2015).
- 4 A News Report (2015): "India Relaxes Border Trade Norms With India", *Economic Times*, May 2 at <http://articles.economictimes.indiatimes.com/2015-05-02/news/>

- 61747138_1_border-trade-trade-deficit-india-and-china, (accessed on September 5, 2015).
- 5 Broadly, globalisation refers to the multiplicity of linkages and inter-connectedness between the states and societies across the world. Such interconnectedness has unleashed the process of inter-state and non-state actors in several spheres and has led to the gradual erosion of boundaries between states and international system. As a result, the concerns between domestic and foreign policy have converged to a point where they become difficult to separate the two.
 - 6 Soft power refers to an attraction by consent rather 'coercion'. For instance, India's culture (both traditional and popular), civilizational aspects, religious diversities and so on can generate immense soft power for India among other nation-states.
 - 7 Information provided in News Piece- 'World Bank in China', at <http://www.worldbank.org/en/country/china/overview>, accessed on 1 June 2017.
 - 8 Brooks, Peter(2007):"Into Africa: China's Grab for Influence and oil,"at www.heritage.org/research/Africa/HL1006.CFM, accessed on October 30,2015.
 - 9 Indian pilgrims crossed Nathu La pass for the first time since the year 1962, to the Tibetan Autonomous Region (TAR) of China, to reach Manasarovar- Kailash which is perceived to be an initiative to promote inter-religious exchanges.
 - 10 China opened Nathu La pass as second route for Kailash pilgrims as promised during Modi's visit in 2015. See details at *First Post*, June 22, at <http://www.firstpost.com/india/all-for-good-relations-china-opens-nathu-la-pass-as-2nd-route-for-kailash-pilgrims-as-promised-during-modis-visit-2306718.html> (accessed on September 5,2015).
 - 11 There are scholars who argue that China has solid economic strategies in opening Nathu La pass. For instance, scholars such as Arya hold the view that China has plans to connect Chinese areas close to Nathu La with Rail road connecting it to Tibet railway linking Beijing to Tibet to a newly opened border point in India's northeast and possibly link it to India's east coast. The other major plan of the Chinese is to link Lhasa with Nyingchi in the east (Arya2008), 'The Train to Lhasa', *Journal of Defense Studies*, Winter 2008, Volume: 2, Issue:2).Therefore, some hold the view that India should also match its efforts in order to counter Chinese Strategy. For instance, they go on to argue that the Union Government of India should conduct joint meetings with representatives from the army, business community and the Government of Sikkim to explore the vistas of opportunity that lie in the region (Teshu Singh 2015) 'India, China and the Nathu La: Understanding Beijing's Larger Strategy towards the Region', Issue Brief, Institute of Peace and Conflict Studies, <http://www.ipcs.org/issue-brief/china/india-china-and-the-nathu-la-understanding-beijings-larger-strategy-204.html>, accessed on August 29,2015).
 - 12 A News report , Xinhua News Agency (2015):"China Focus: China opens new route for Indian pilgrims to Tibet", June 22, at http://news.xinhuanet.com/english/2015-06/22/c_134346323.htm, Accessed on August 30,2015.
 - 13 Ibid.
 - 14 As reported in DNA.China opens Nathu La as second route for Kailash- ManasarovarYatra pilgrims (2015), The DNAIndia, June 22, <http://www.dnaindia.com/india/report-china-opens-nathu-la-as-second-route-for-kailash-manasarovar-yatra-2097829>, (accessed on September 1, 2015).
 - 15 A terminology which was recently added to India's foreign policy discourses.Pleasesee, P.Shobdan. (2016): *Asia's Buddhist Connectivity and India's Role*, Issue Brief, New Delhi: Institute for Defence Studies and Analysis,available at: <http://www.idsa.in/>

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- 16 Statistics and information as shown in the website of Ministry of Development of North Eastern region, Government of India, <http://mdoner.gov.in/content/items-border-trade-%E2%80%93-nathu-la>, (accessed on September 1, 2015).
 - 17 “India relaxes border trade norms with China” *Economic Times*, 2 May at http://articles.economictimes.indiatimes.com/2015-05-02/news/61747138_1_border-trade-trade-deficit-india-and-china, (accessed on August 31, 2015).
 - 18 News Report in *Economic Times* (2007): “Indo-China border trade attracts few traders”, May 1, *Economic Times*.
 - 19 Commerce and Industries Department, Government of Sikkim, Indo-China Border Trade through Nathu La Pass, available at: sikkimindustries.gov.in/report%20on%20nathula%20trade.pdf (accessed 12 May 2015).
 - 20 See “Trade thru Nathu La Pass may take off by second half of 2006,” available at: <http://www.thehindubusinessline.in/2005/12/20/stories/2005122001130700.htm> (accessed on September 5, 2015).

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A New Socio-Medical Gaze: The Political Anatomy of Epidemic Management in Kerala

Sajan Thomas

This article discusses the reconfigured ways in which the Primary Healthcare Centers (PHCs) operate in Kerala during the epidemic crisis posed by viral fevers, particularly that of Chikungunya and H1N1. I explore the situation in Kerala by invoking the theoretical lens of ‘dispensary gaze’, which was developed by David Armstrong in his Foucault-inspired analysis of medical knowledge in the twentieth century Britain. By using the examples from Kerala, I will demonstrate how PHCs were turned into a device – to quote from Armstrong’s well-known book titled *Political Anatomy of the Body* (1983) – “for making visible to constant surveillance the interaction between people, normal and abnormal, and thereby transforming the physical space between bodies into a social space traversed by power.”

The Foucauldian medical gaze is essentially a social relationship that takes place between the doctor and patient. This relationship was formulated out of new institutional spaces and practices along with new scientific discourses, methodologies, record keeping and forms of authority, that together created the historical emergence of the clinic. Modern doctor-patient relations are viewed as socially and culturally constructed in ways that incorporate but also extend beyond the bureaucratic and scientific organization and functioning of the clinic (Foucault 1973; During 1995). The incorporation of bureaucratic and scientific procedures, methods and knowledge into medicine and its institutions becomes treated as a historical socio-cultural process. Foucault was studying historical transformations in what western medical practitioners saw and recorded during the eighteenth and nineteenth centuries. He was interested not in progress and an accumulation of medical knowledge but in radical transformations of the medical gaze as patients submitted to the “the objectifying surveillance and control of modern medical authority” (Bowler & Morus 2005:445). The medical gaze only discloses to a practitioner who is trained what to see. The assumption is that doctors are

capable of revealing the underlying truths about the human body (Silverman & Torode 2011, Wilson 2005). As Foucault put it; “medical rationality plunges into marvelous density of perception, offering the grain of things as the first face of truth, with their colours, their spots, their hardness, their adherence. The breadth of the experiment seems to be identified with the domain of careful gaze, and of an empirical vigilance receptive only to the evidence of visible contents” (Foucault 1973: xiii).

David Armstrong (1983) uses the example of the late-nineteenth century Edinburgh dispensary, especially the outpatient clinic treating tubercular patients. Instead of operating more or less within the hospital walls, the Edinburgh dispensary organized healthcare by “radiating out into” the community. By viewing the dispensaries in this way, using the Foucauldian model for the dissemination of medical power, Armstrong demonstrates how medical power was able to grow and infiltrate society so as to reorganize people’s understandings and their practices. His prime concern was the medical gaze being “extended out into the community, rather than the pure clinical subject who is brought into being in the health clinic” (Dyson & Brown 2006:68). The new tuberculosis dispensary founded in Edinburgh triggered a scenario whereby the dispensary was no longer “a single immobile point” that provisions medical assistance. It rather represented, to quote Armstrong (1983:8), “a new perceptual structure – a new way of seeing illness which manifested itself in different ways”. This reinforces Foucault’s point that the private lives of the population became the object of this extended gaze partly by focusing on the relationship between bodies, and not just the body itself (Fox 2000). Similarly, following the epidemic crisis in Kerala, there emerged a major transformation in the ways through which the PHCs connected to the local community.

It should, however, be noted that there is a significant difference in the medical context of the Edinburgh dispensary and the revitalized PHCs in Kerala that extended their gaze into the community. The Edinburgh dispensary was primarily concerned with tuberculosis – a bacterial disease that took a heavy toll on human lives until the 1950s. The first half of the twentieth century saw tremendous advancements in the treatment options for tuberculosis; immunization and effective anti-bacterial drugs were developed in a systematic way. The social conditions for tuberculosis – poverty and overcrowding – were substantially overcome in Britain during the earlier parts of the last century. Dispensaries therefore extended their gaze into the community at a time when bacterial diseases were coming under control, and the life expectancy of the British people was speedily increasing (Bryder 1988). By contrast, the post-2000 medical context in Kerala is rather different. The extension of revitalized PHCs into the community occurred at a time when all of

Kerala had come under the grip of viral diseases that consisted of both emerging and re-emerging infectious epidemics (Thresia & Mohindra 2011). Though these epidemics were not the top causes of death in the population, nevertheless more people were dying of viral diseases, particularly the mosquito-borne viral fevers like Dengue and H1N1, than was the situation previously. As is well known, compared to bacterial diseases, modern medicine has no simple and effective cure for most viral infections. Viral fevers are usually treated symptomatically, with anti-pyretics, fluids and rest (El-Radhi 2009).

The new panoptical order

Since 2009, a series of awareness campaigns and home visits by health care volunteers have also been instigated. These specific actions seeking to work with the local communities have clear parallels with the Edinburgh tuberculosis dispensary analysed by David Armstrong. What made the Edinburgh dispensary model different from its predecessors is the community-based activities it promoted. Home visits emerged as a major priority of the dispensary. The purpose of such visits was to assess the needs of those who suffered from tuberculosis and discover the conditions under which they lived. Such dispensaries took the clinical gaze outwards into the community, and thereby brought forth a new surveillance regime (Tambling 1990, Prout 2005). According to Armstrong (1983: 37) “surveillance discovered disease in the community and this discovery necessitated further surveillance”. The dispensaries perceived disease in part as a social phenomenon, requiring a surveillance regime to control the behavior, morality and well-being of the population.

The new measures that have been put in place in Kerala to prevent the outbreak of mosquito-borne diseases create in this district something similar to the ways in which the Edinburgh dispensary unleashed a new terrain of panoptical practices in the United Kingdom long ago (Prout 2005). “The dispensary represented the Panopticon writ large,” Armstrong (1983:9) argues, “a whole community traversed throughout by hierarchy, surveillance, observation, and writing”. A series of such ‘socially encompassing’ surveillance strategies have come into prominence in modern public health interventions. Such a regime requires “the social body to be monitored to include both the normal and the abnormal” (McCallum 1998:75). In addition to the ‘abnormal’ (i.e. the sick and deviant), ‘normal’ individuals also fall within the surveillance gaze of dispensaries. When this surveillance is extended into the community, the emphasis of health care interventions begins to shift from “those who were ill to those who were potentially ill” (Nettleton 2006:250-251). This is the emergence of what Beck calls the risk society, a society where regimes of knowledge and power exist to control potentialities.

The complex epidemiology and natural history of mosquito-borne epidemics makes their diagnosis and control particularly challenging, consequently encompassing surveillance over the society is the only option. Though my central focus is chikungunya and dengue, another mosquito-borne disease, filariasis, has become a problem in the area. According to newspaper reports,¹ filariasis is increasingly prevalent among migrant laborers from the north Indian states working in Kerala's booming construction industry. The causative organism, microfilariae, is transmitted from one person to another through the bite of infected culex mosquitos, which breed in dirty water. Microfilaria can live in a person's body for many years before the symptoms become manifest as elephantiasis of the limbs. Sufferers and carriers may never recognize that they have been infected until it is too late. Filarial nematodes – namely *Wuchereria Bancrofti* and *Brugia Malayi* – can remain in human bodies undetected for a period up to 15 years. In an effort to eliminate the mosquitoes, the health department has instigated control measures such as frequent home visits to create awareness and to control environmental conditions around homes and work.² *Culex* mosquitoes survive mostly in stagnant and dirty water pools, so eradication of these breeding grounds is a high priority.

Kerala's health department also organized a Mass Drug Administration (MDA) program for lymphatic filariasis in April 2012, mostly through home visits by the ASHA workers, aimed at ensuring a break in the transmission cycle of the filarial parasite. According to Health Department sources, a large section of the population – except children under two years, pregnant women and sick persons – were given Diethylcarbamazine Citrate and Albendazole tablets through a door-to-door campaign. But difficulties were encountered. The ASHA workers had to be given instruction to combat popular misconceptions that filariasis was a poor man's disease. "In Kerala, we have never been able to convince people that everyone is vulnerable to the infection. MDA has remained the least popular public health programme of the Health Department because the public believes that filariasis afflicts only the poor," to quote a senior Health official.³

Following in the footsteps of the Edinburgh dispensary, medico-social surveys have become an integral part of the emergent medical panoptic order in Kerala. They allowed the PHC to extend its gaze throughout the community. Speaking of medical surveys in general, Armstrong (1983:51) writes, "the survey [is] a synthesized gaze to relationships, to the gaps between people". Indeed, surveys have been critical to the mechanisms of medical power and their expansion. The technologies of the survey, as Armstrong rightly notes, "established the possibility of removing the abnormal/normal divide. The survey classified bodies on a continuum: there were no inherent distinctions between a body at one end and one at the other, their only difference was the spaces which separated them". In Keranad the community health

team constituted by the PHC has visited every household for larval surveys with an information sheet. Headed by the health inspector and comprised mostly of ASHA workers, their basic duty has been to collect details about those suffering from an epidemic disease; a separate section requires details of bed ridden patients, if any⁴.

Assessing the condition of household waste management was and remains a major concern of home visits. Every health volunteer is expected to ask the household members about the ways in which household waste is disposed. There is a separate inquiry regarding the water sources – type of wells – within the house premises. These home visits are predominantly aimed at mosquito/larvae control and source eradication. When ASHA workers enter each house they inspect likely sources of mosquito larva breeding such as terrace and sun shades, water tanks, plastic vessels, rubber tyres, household appliances, flower pots, drainage, water containers, fridge, coconut shells, and any other possible water holding vessels. They ask the head of the household to eliminate all the stagnant water, however small it is. If mosquito larvae are found to be present in any of the aforesaid sources, the household members will be alerted so as to make them aware of the hidden danger. Often it is impossible to destroy all mosquito breeding sources and some will remain. These have to be noted separately in the information sheet.

The Health Inspector collects the filled out information sheets from each surveyor and enters the data into the PHC's computer network. In accordance with the WHO guidelines for vector surveillance⁵, these data will then be used for index preparation. The following are the indices: House index (the percentage of houses infested with larvae and/or pupae) Container index (the percentage of water-holding containers infested with larvae or pupae) Breteau index: number of positive containers per 100 houses inspected. Regularly updated indices prepared by PHC –similar to that of the Edinburgh dispensary – have become important for normal monitoring of the health of the population.

Emerging surveillance regime

Surveying is not simply a device for ensuring ample surveillance over the community. Surveys of the Edinburgh dispensary type rather represent a fusing of the techniques of surveillance with the system of disciplinary power. A survey conducted by the PHC in Northern Kerala village⁶, under the guidance of the community medicine department at the Calicut Medical College, is worth discussing here. I participated in organising this survey in 2010 and its aims were to identify the nature of chikungunya pains, especially its relation to various kinds of joint pains associated with rheumatism. This was a questionnaire-based survey among those affected by chikungunya who were over fifteen years of age. The following is a translation of some of the questions.

1. Which part of your body is affected with the chikungunya pains? How long do those pains remain in your body? If they are persistent, indicate the duration?
2. How severe were the pre-existing pains?
3. Has the incidence of chikungunya fever brought forth any change in pre-existing rheumatic pains?
4. How many days after the chikungunya fever before you restarted your daily routine?
5. Have the pains associated with chikungunya reappeared during the last seven days?

The questionnaire asked patients to locate the pain-affected areas in their body. A diagram was also provided for people to pinpoint the joints that had swelling and pain associated with the chikungunya. When travelling with the surveyor I noticed the difficulties he faced in collecting the required information. When answering the questionnaire, especially marking the pain-stricken joints in the body diagram, many respondents recounted pains and suffering that could not be reduced to the prescribed boxes. Many of them questioned the very logic of giving separate boxes to pain when the pains associated with their persisting chikungunya were not fixed to a certain joint but moved all over the body. When they started to narrate their illness episodes, the surveyor would often intervene and ask them to point to the specific joints marked in the diagram. He would tell the respondents that the “other” pains were not part of chikungunya, and thus could not be included. In a private discussion, the surveyor revealed that “making” the responses of chikungunya victims correspond with the biomedical understandings of pain radiation was very challenging. “Listing the pains that ‘float’ in the body for the correct box is a herculean task”, he asserted. The chikungunya-joint pain identification survey could be viewed as more than a tool for “the objectification of personal experience through its constant measurement and analysis” (Armstrong, 1983:51). It was also an apparatus of order and social control. As Armstrong has put it, “the survey, a mechanism for ‘measuring’ reality, could be transformed into a technology for the ‘creation’ of reality; the tactics of survey could make the operation of disciplinary power throughout a society more effective and more efficient”.

The social surveillance in managing H1N1

I will now turn to a brief discussion of the “hospital-to-home-to-community” transition that occurred in the epidemic management of H1N1 between June and December 2009. By then, the community transmission of the H1N1 virus had become established and in that time the focus of public health interventions shifted

from airport-based containment to home-based and community level management. The quarantine units in the hospitals remained in place, but they no longer constituted the dominant treatment option. Such a shift in the clinical management of H1N1 in Kerala, for reasons which I will elaborate below, unleashed a different mode of surveillance over the community. Like the Edinburgh dispensary, the social body was made visible and subject to the clinical gaze. Radiating out into the homes and the community became the central clinical management trajectory deployed around H1N1. The PHCs were a device “for making visible to constant surveillance the interaction between people, normal and abnormal, and thereby transforming the physical space between bodies into a social space traversed by power” (Armstrong, 1983:10). However, unlike what happened in the case of the mosquito-borne diseases, the H1N1 community-level interventions were fundamentally authoritarian in nature as they involved more penetrating practices of panoptical power. Popular explanations about the disease were silenced and home-based quarantine systems were imposed to handle confirmed and suspected H1N1 cases. Notwithstanding the substantial gap in the epidemiology knowledge of the novel virus and insufficient information about the clinical complications of the infection, the state health department came up with ‘precise’ instructions for the people. The whole society was put under surveillance without being informed of the rationale behind these emergent modalities of clinical power. The following traces the ethnography of how this new surveillance regime worked in Kerala.

From hospital to the home

As mentioned in a previous chapter, the compulsory quarantine of all suspected H1N1 cases intercepted at the airport was based on the assumption that the transmission of the ‘invader’ virus into Kerala could be prevented by establishing a fool proof surveillance system at the entry point. The H1N1 cells at the three international airports worked on a 24 hour basis to screen arriving passengers and the government hospitals adjacent to the airports were equipped with separate isolation wards. Special wards were set up at all medical colleges to treat severe H1N1 cases. More than 100 screening and 14 testing centers – one in each district – were opened and separate ventilator facilities were made available. The throat swabs of those who had flu symptoms were taken for the confirmatory test which was being conducted at the virology institutes at New Delhi or Pune.⁷ The absence of any major complications arising from the pre-emptive medication prompted the state health department to insist on immediate treatment without waiting for confirmatory results from the virology institutes. Two antiviral drugs – Tamiflu and Relenza – were used to treat the quarantined cases. Personal protection equipment like triple-layer surgical masks and gloves were provided to

the hospital staff to avoid any further dissemination from the hospitalization of the confirmed / suspected H1N1 cases.

By September 2009, the airport-based controls had become outmoded as H1N1 ceased to be an 'elite' disease that solely affected the international passengers and was transmitted mostly through airports. Some of the Indian metropolitan cities like Mumbai, Pune, Hyderabad and Bangalore were affected by this epidemic disease on a major scale. The succeeding months witnessed the reporting of H1N1 among family members, friends, and neighbors of Keralites who were working in or had travelled to the major cities in India. Subsequently, the health department in Kerala, following an instruction from the central government, decided to stop the screening of passengers at the airports. Since community transmission of the H1N1 virus was well-established in Kerala, it was pointed out that there was no harm in discontinuing airport screening. The airport-based surveillance was found to be using up valuable monetary and manpower resources of the health department and the replacement of the same with help desks was expected to enable the government to focus more on community-level surveillance. Instead of subjecting all passengers to medical examination, they were to be directed to help desks, where all information on H1N1 infection, including general precautions, guidelines and testing/treatment facilities would be made available. Passengers would be encouraged to voluntarily report at the help desk if they were suffering from any flu-like symptoms.⁸

The hospital-based quarantine system was subsequently replaced by home quarantine whereby only those having severe symptoms were admitted and those who had mild symptoms were asked to confine themselves to home after undergoing their initial hospital treatment. Patients with mild fever, sore throat, body ache, headache, diarrhea and vomiting did not require testing for H1N1 or administration of Tamiflu. After furnishing their personal details to the H1N1 cells headed by the health inspectors, they were given symptomatic treatment and allowed to go home. The assumption was that such mild cases could be treated at home by adhering to the preventive measures and maintaining alertness to the symptoms of the flu.

In the case of home quarantine, the suspected H1N1 infected person was asked to take the given medicines for a stipulated period of time. They were expected to contact the hospital only if the symptoms become severe or if any other complications arose. Their condition was to be closely monitored and re-assessed after 24 to 48 hours through the home visit of a PHC doctor. Those who were in home quarantine, in accordance with the guidelines issued by WHO, were given clear instructions such as the use of towels while coughing, regular washing of hands with soap water, increased fluid intake etc to prevent the risk of contracting the

infection. Triple-layer surgical masks and gloves were supplied to use in situations in which regular contact was unavoidable, otherwise relatively closed contact with the suspected human case was advised. The people were told that this personal protection equipment would reduce the risk of infection if used correctly. The family members of the suspected H1N1 case were also asked to take medicines. It is interesting to note that the remaining family members were not given preventive medicines. The dosage varied as per age and body weight; nonetheless every family member was given the same medicine as the confirmed/suspected persons. It should be noted that though home quarantine was advised in most cases, a limited number of hospital quarantine units remained in place.⁹

In the earlier days of the pandemic, even those having mild symptoms were tested and often testing was also done on demand. However, following the advent of home quarantine, the state health department decided to limit testing to acute and chronic cases. Testing all the samples was found neither feasible nor necessary as their total number was beyond what labs and microbiologists could handle. The fact that a single test costs about 3500 rupees to the government was also a limiting factor. The strategy adopted was segregation of cases at the preliminary level to ease pressure on the medical fraternity by avoiding indiscriminate testing. Patients with severe illness and feeling at high risk of flu complications needed to consult the H1N1 cell under the health inspector to determine whether flu testing or treatment was needed.¹⁰ People were advised to remain at home and not to rush to hospitals and fight with doctors to test them for H1N1.

The absence of any sudden complication or adverse side effects with the H1N1 drugs also acted as an incentive to discourage testing. It should be noted here that there existed a government monopoly in the administering of Tamiflu and Relenza. The only place where one could get access to these drugs was the H1N1 cells at selected government hospitals. Fearing the risks associated with their indiscriminate use, the private hospitals and pharmacy shops were banned from stocking the same. As the Health Inspector in Keranad rightly put it, "If the monopoly over the drugs against H1N1 is left with the private sector, there could be an indiscriminate supply within a short span of time. It may lead to a situation whereby the virus becomes resistant to the existing drugs. An eventual outcome will be mutation in the present virus, making the best available medicines less efficient".¹¹ Considering the fact that swine flu symptoms resemble in many ways those of an ordinary fever, and given the panicky situation that existed on a global scale, the health inspector's apprehension remained a strong possibility. Later, a few private hospitals were supplied the medicines from nearby government hospitals. It is interesting that when a State minister got affected with H1N1, he was treated in a private hospital.

From home to the community

The home quarantine system was soon found to be unworkable for two reasons. Firstly, unlike the case of chikungunya, the victims felt H1N1 was a ‘soft’ disease¹² as it involves limited bodily incapacity and persisting pains. Notwithstanding the overarching media hype and the frequent reporting of H1N1 deaths in Kerala, those who were put in home quarantine considered their imprisonment totally unnecessary. The softness of H1N1 fever and the availability of effective drugs prompted those who were quarantined at home to argue for an immediate release. The following comment by the headmistress of a school in Keranad sums up the situation: “We were told that H1N1 is a big disease, but the affected students, including those who were tested positive, were able to live without any serious problems. One of the colleagues tested positive for H1N1. But she doesn’t even have the problems of a normal viral fever”. The headmistress was of the opinion that H1N1 is nothing more than a normal monsoon fever, and thus there was no need for home quarantine. Secondly, the sharp increase in the number of H1N1 cases in the major south Indian cities added to the vulnerability of Keranad, despite being a small-scale village tucked away in Kerala.

The disease spread through employees and students via whom Keranad was connected to major Indian cities. However, like most other regions of Kerala, Keranadans produce very few goods needed for local consumption and consequently food and most other items necessary for daily life are imported from other Indian states. These imported items reach Kerala through the major south Indian cities that were hit by H1N1. In addition, much of the wage laboring population in Kerala travels and works in other parts of India. Given that everyday life in Keranad was inextricably linked with the H1N1 affected cities, it was impossible to prevent the community transmission of the virus through putting the infected cases in home quarantine.

The shift that happened in the identification of the H1N1 risk group reflects the aforementioned limitation of the home-quarantine system and the need to put in place a community-based one. During the initial stage, those in the risk group were the immediate family members of the confirmed/suspected who had either a foreign or an outside Kerala connection. The risk group gradually widened to include those who had any sort of contacts with anyone who travelled from the H1N1-hit countries or places. For instance, when H1N1 was confirmed in one of the 50 students in a class, and five started showing flu like symptoms, all the remaining 44 were considered to be the risk group. The family members of both the confirmed and suspected students were also part of the risk group and were given medicines. When further community transmission of the virus had been identified, the criteria for being in the risk group further widened. The subsequent situation was such that

if anyone in the school showed swine flu related symptoms, medicines would be started immediately without any tests. Even students in the nearby schools fell in the risk group if they had contacts with students in an H1N1 affected school.

By December 2009, the way H1N1 risks groups were identified underwent substantial transformation. What became more important was the travel or contact history of the suspected H1N1 person. For instance, when one of the teachers who accompanied students on a tour developed a mild fever and runny nose, his entire family members were forced “to become H1N1 patients” without any confirmatory tests. He told me he considered his fever symptoms bore no relation to H1N1. “Fever is very common to a person who moves suddenly from a hill station like Kodaikanal to Madurai, which is a hot place”, he said. He even suspected that the doctors might have had some special agenda in branding every common fever as swine flu.¹³ Apparently, a few days later H1N1 was diagnosed in a nearby school. This time there wasn’t any tour history, but four students who belonged to the same form tested positive for H1N1. The H1N1 cell at KPHC, after analyzing their contact history, found that the affected students met together for a movie at the town theater. The theater was identified as the point of transmission. I also met people who were identified by the H1N1 cell to have contracted the infection from funeral and marriage functions. The point I am trying to make is that mere participation in some recent group activities will drag a person into the risk group.

What needs to be added is that the political contestations over H1N1 fever took place in 2010 when the “invader” global pandemic of 2009 was turned into an internal, clinically manageable fever. The number of mask-wearers came down drastically, notwithstanding the daily news update about rising H1N1 figures. Public places, educational institutions and social gatherings – all returned back to the normal. Those were also the days when it was difficult to clinically differentiate between H1N1 and monsoon fevers. The virus had mutated and common cases of influenza were suspected and diagnosed as H1N1. Common respiratory illnesses associated with the monsoon fevers such as a cold and cough were turned into swine flu. Tamiflu, the leading drug for treating H1N1, was made available in selected private hospitals and medical shops.¹⁴ The strengthening of the treatment delivery system and ensuring the availability of medicines became the prime government concern. The government mobilized its public health personnel at the grassroot level (PHC doctors, nurses, health inspectors, and ASHA workers) so that drugs could be dispatched and administered immediately.

Conclusion

The revitalization of the PHCs in Kerala goes beyond the renovation and up-gradating of the existing village network or the starting up of new dispensaries.

What has been put in place is a primary health care system which can also reach out into the community through non-clinical ways. PHCs in Kerala are no longer simply a place for the screening, diagnosis and treatment of the sick and deviant. More than pathologising local populations PHCs are also a form of social control. They are “located firmly with the community and [their] function is to identify, probe and monitor disease and its manifestation within the reaches of the community” (Powell 2006:58). Besides ensuring that doctors see patients and that medicines are free or available at a very low cost, an institutional mechanism is devised to extend PHC activities to the everyday lives of people. The linchpin of such a mechanism is the extensive network of ASHA workers recruited from the respective communities. The PHC becomes a coordinating structure because, as Armstrong (1983:8) has put it, “illness was sought, identified and monitored by various techniques and agents in the community”. The Edinburgh dispensary functioned as an apparatus of surveillance by mapping not just the geographical but also the social space. The medical gaze shifted from an analysis of the microscopic detail of the individual body to the ‘undifferentiated spaces’ that lay between bodies, thereby forging a new political anatomy. The way the epidemic crisis was managed through the PHCs in Kerala during the post-2007 period reflects this new political anatomy.

Notes

- 1 *The Hindu*, 7 March 2013.
- 2 *The Hindu*, “Mass drug administration against filariasis begins, : 27 April 2012.
- 3 *The Hindu*, “Five districts being readied for filariasis elimination,” 6 May 2014.
- 4 The information sheet also asked for information about three growing life style diseases – diabetes, high blood pressure and cancer.
- 5 World Health Organization-Dengue control (n.d.). Retrieved on 10 May 2012 from http://www.who.int/denguecontrol/monitoring/vector_surveillance/en/
- 6 When I started my principal fieldwork in Keranad in 2009, after the major outbreak of chikungunya had occurred in 2007, there were extensive chikungunya outbreaks in Northern Kerala. To understand the extent and nature of the epidemic crisis, I conducted a series of field investigations at the PHCs particularly the regions in and around the Kozhikode city.
- 7 During the initial phase there hadn’t been any testing facility in Kerala and it was only on 18th August 2009 that the Central Ministry of Health and Family Welfare approved the Rajiv Gandhi Centre for Biotechnology at Thiruvananthapuram as an authorized diagnostic centre for testing the H1N1 virus.
- 8 Such a move followed the realization that most passengers used to hide information about any mild symptom they might have, fearing undergoing 5-7 days of compulsory quarantine at a government hospital. Many nonresident Keralites who were quarantined at the government hospitals protested over the poor facilities provided to them.
- 9 Compulsory hospital quarantine was followed only for serious H1N1 cases with severe symptoms in whom the high risk for sudden complications could lead to multiple organ

- failure, resulting in death. At an advanced stage H1N1 may also lead to viral pneumonia, which is more severe than the bacterial one.
- 10 The following are the statistics from the Kodichal government hospital as on 11 December 2009: Out of the 443 people screened for H1N1, 312 were given medicines and only 46 cases were sent for confirmatory test. Testing was usually conducted in exceptionally rare cases like the pregnant women to avoid possible complications.
 - 11 Interview conducted by the researcher on August 2009.
 - 12 WHO increased the pandemic alert level of H1N1 to six due to its widespread nature, rather than the severity of the epidemic disease. The very fact that H1N1 spread to more than 100 countries during the first five months after its first inception in March 2009 made it a pandemic.
 - 13 The public health authorities, however, asked the school to close for a temporary period to prevent the further spread of the virus. The school management opposed the suggestion saying that an immediate closure would bring a permanent bad mark for their school. They preferred to isolate the H1N1 suspects by sending them home for quarantine. As reported by some parents, the teachers were very vigilant during those days and even a simple sneeze would not be tolerated. The school, however, closed for a week following the instructions from government. When the school reopened many students came wearing their kerchiefs as masks. The Health inspector from the KPHC conducted an awareness campaign on the reopening day and the school headmistress was advised to avoid study tours outside the State.
 - 14 *The Hindu*, "Tamiflu made available at private hospitals", 1 July 2010.

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Global Innovation Divide and Access to Health Technology: Cancer Medication in India

Girish Kumar R

1. Introduction

Writing in 2003, Jeffrey Sachs discusses the ‘incredible divide’ between the technology innovators and non innovators, which is ‘starker than the global divisions of income’ (Sachs 2003). There is great skewness in commercialised technological innovation. Sachs divide the world into three for analytic purposes- the ‘endogenous growth countries’ having a buoyant innovation system, where roughly 1 billion people dwell and enjoying endogenous growth through innovative products and technology sold in the domestic economy and world markets; secondly ‘technological diffusers’ like China, India, Mexico, etc., having the capability to absorb new technology developed in endogenous growth countries within five to twenty years. These nations seldom display innovation themselves but are capable of retrofitting internationally imported technologies for domestic use. They include three and half a billion people, little more than half of the world. ¹Rest of the world population totaling one and a half billion in the world economy represents the ‘marginalized’ in the area of technological advance. They experience penetration of modern technologies like mobile phones or computers, but the diffusion and extent of application is low. The gap is perspicuous in patents. Thus in 2000, the top 10 innovating nations with barely 14% of world’s population held 94% of all patents taken out in US. The bottom 128 countries with population of at least 1 million or 63% of global population had just 0.75% of all the patents taken out in US. (Sachs 2003). Patents create an oligarchical market structure as they bestow proprietary rights to intellectual property. The effect is horrendous in the health system because patented medicines restrict poor’s access to medicines. For instance, the high cost of cancer treatment makes it inaccessible for the poor and a major public health concern in India.

Global innovation divide is a self –explanatory concept which has created significant difference between the developed and developing world in terms of quality of life afforded by advancement in medical and health technology. The ‘innovation divide’ refers to the existence of a gap between countries with the greatest capacity to innovate, and those with the least capacity to innovate. The gap poses a threat to achieving the Sustainable Development Goals (SDGs) of the UN 2030 Agenda. Health is one of the centrally positioned goals (SDG 3) and has thirteen targets covering all major health priorities to be met. Despite the UN’s target the gap is widening fast in the health sector, as the post WTO world made the implementation of TRIPS mandatory and stringent and made access to health technologies more and more restrictive. The North/ South dichotomy becomes more and more pronounced in the health sector. Medical discoveries and the consequent access to advancements in health technologies widen this divide! The paper is divided into three parts. First part discusses the medical innovation divide between the North and the South from an IR perspective. Second part makes a review of existing methodologies in innovation studies, which could enable us to assess the strength or weakness of a nation’s ecosystem of health innovation and the subsequent access to health technology. In the third part we will be taking cancer medication in India as the case study. The article attempts to make an international relations (IR) reading of the subject and argues that the existing theoretical frameworks in innovation studies are premised upon theoretical construct of neo-classical economics and hence, many a time, it turns out to be a failure in assessing the situations in the developing countries.

Impressive progress in health was achieved by people in all countries in the world over the last 200 years. It led to increases in life expectancy. In the UK, for instance, life expectancy doubled and is now higher than 80 years. In 1900 it was 45.62. A century ago life expectancy in India was as low as 23 years. A century later, life expectancy in India has almost tripled. This is attributed to the medical revolution that is taking across the world (See table)

Table 1: Global life expectancy over the ages

	Africa	Americas	Asia	Europe	Former Soviet Union	Oceania	Global average (a)
Period when earliest health transition in region began	1920s	1820s or 1830s	1870s-1890s	1770s	1890s or 1900s	1860s or 1870s	
Life expectancy before health transition	26.4	34.8	27.5	34.3	29	22.5 (b)	

1800				33.3		excluded (c)	
1820				35.6		excluded (c)	29
1850		35.1		36.3			
1870		35.1		36.2		34.7	29.7
1900		41	28	42.7		47.6	
1913		45.1	28.1	46.8	34.2-38.6	51	34.1
1950	35.6	58.4	41.6	64.7	56.1	63.4	48
1973	46.9	66	57.5	70.9	68.9	68.2	60
1990	52.9	70.8	64.5	74.2	69.1	72.8	
2001	50.5	73.2	67.1	76.8	66.6	74.6	66.6

Source: Our World in Data available at <https://ourworldindata.org/life-expectancy/>

The World Health Statistics 2016, which spotlights on health and health-related Sustainable Development Goals (SDGs), makes an annual compilation of health statistics for its 194 Member nations. It takes life expectancy to assess the great divide among the nations (WHO 2016). Statistics show the existence of wide disparity in life expectancy worldwide. The life expectancy has been increasing globally. Since 1950 it improves at a rate of more than 3 years per decade. The 1990s is an exception due to the rising AIDS crisis in Africa and the increased mortality in many former Soviet countries. The divide is so alarming that one's citizenship decides his life expectancy, the probable age he is going to live. Thus a Swiss citizen has the probability to live upto the age of 83.4; but his counterpart in Angola, where the life expectancy is only 52.4, would be living thirty years shorter! The average life expectancy Worldwide at birth was 71.5 years, of which 103 nations have life expectancy above the world average and 80 nations are positioned below the world average (See the table).²

Table 2 Life Expectancy: The best performers

	Nation with rank (From top)	Life expectancy
1	Japan	83.7
2	Switzerland	83.4
3	Singapore	83.1
4	Australia	82.8
5	Spain	82.8

Table 3 Life Expectancy: The worst performers

	Nation with rank (from bottom with rank)	Life expectancy
1	Sierra Leone (183)	50.1
2	Angola (182)	52.4
3	Central African Republic (181)	52.5
4	Chad (180)	53.1
5	Cote d' Ivoire (179)	53.3

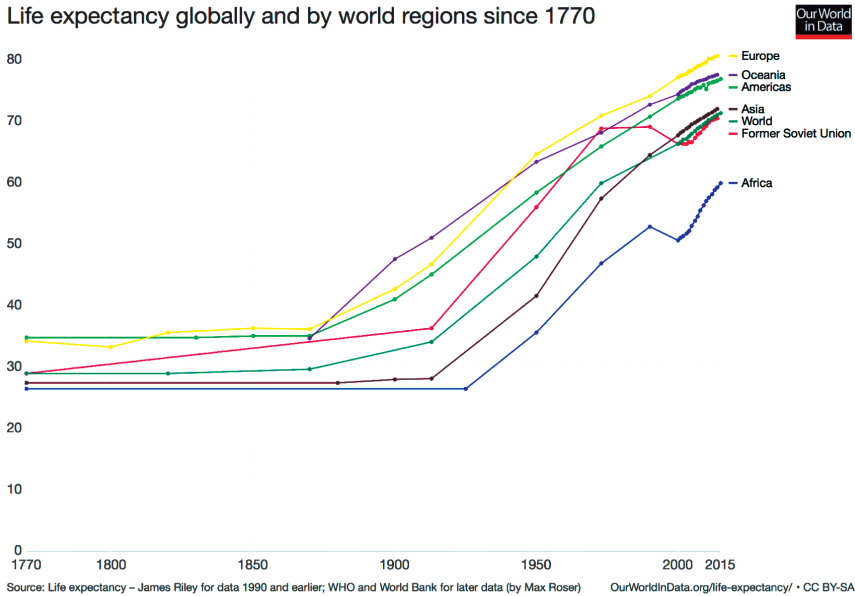
Source: WHO (2015).

Among eight nations from South Asia Only three, Maldives, Srilanka and Bangladesh rank above global average. Rest including India lag behind.

Table 4 Life Expectancy: South Asia

	Nation with global position	Life expectancy
1	Maldives (34)	78.5
2	Sri Lanka (81)	74.64
3	Bangladesh (102)	71.8
4	Nepal (118)	69.2
5	India (125)	68.3
6	Pakistan (130)	66.4
7	Afghanistan (161)	60.5

Life expectancy in each region of the world remained fairly stable for most of history until the beginning of the “health transition,” the period in which life expectancy began to increase. However, the health transition began at different times in different regions (see figure). Oceania experienced improved life expectancy around 1870, the same happened around 1920 in Africa (Roser nd). “Knowledge, science and technology are the keys to any coherent explanation...Most recently, the major life-saving scientific innovations in medical procedures and new pharmaceuticals have had a major effect, particularly on reduced mortality from cardiovascular disease. There have also been important health innovations whose effect has been mainly in poor countries: for example, the development of freeze-dried serums that can be transported without refrigeration, and of oral rehydration therapy for preventing the death of children from diarrhea.” (Cutler, et.al, 2006)



Source: <https://ourworldindata.org/life-expectancy/#note-7>

Fig. 1

But the 1990s saw the reversal of improvement in life expectancy in Africa. One of the reasons that impeded equitable access to health technologies was the existence of global regime, i.e., the TRIPS regime under WTO. It widened the gap between the developed and developing nations as far as access to medicines and health technologies is concerned. The stringent patent regime of WTO impeded accessibility to medicines and medical advancements. For instance, India, once known as the pharma of the poor, could produce patented medicines through the process of reverse engineering. This ensured the quick availability of modern medicines at a cheaper price. The process was reversed due to TRIPS. This implies the internalization of international patent regimes into the municipal law of India aggravated not only the medical divide between the North and South, but also widened the divide between the rich and poor in India's domestic system. The existence of rules related to positive discrimination like WTO's Special and Differential Treatment has not made any effect on the convergence process, i.e., the process that diminishes the divide between the highest innovators and the least innovators. The divide has also created a clash among global governance regimes involving WTO, the *lex specialis* regime in trade on the one side and WHO, *lex specialis* regime in health, and the UN, the *lex generalis* regime. The

then UN General secretary, after seeing the AIDS scourge in Africa declared that a war like situation in Africa was fashioned, creating “millions of orphans and providing a recipe of conflict and political instability”. The UN Security Council in 2000 deliberated the impact of AIDS on peace and security in Africa. The debate marked the ‘first time that the Council has discussed a health issue as a threat to international peace and security’ (UNSC 2000). Thus the global setting widened the gap between the developed and developing nations as far as access to medicines and health technologies is concerned. UN General Assembly echoed similar views emphasizing the need for ‘increased access to technological innovations, particularly in the health sector, balancing intellectual property rights with the needs of patients in developing countries’ (UNGA 2000). We could easily discern that WTO’s patent regime, an externality, has widened the innovation divide between the developed and developing nations. The persistent R&D intensity gap between developed and developing nations, and the continuous failure of lagging South to catch up in this area makes the gap more alarming and the convergence process slow, uneven, and even to a halt. The increasing out of pocket expenditure of common man in the South that is also having a poor insurance system complicated the process further. No wonder, speaking on the global innovation divide in 2002, Jeffrey Sachs an adviser to UN Secretary General Kofi Annan, argued that “the challenges of economic development are not going to be addressed properly until we better integrate issues of science and technology into the basic economic development strategies of low-income countries”. And Sachs also warned that the tightening up of intellectual property rights — for example in the field of biotechnology — “may slow the diffusion of technology to the world’s poorest countries that has traditionally come through copying and reverse engineering”.

The scientific community from the North under the aegis of WTO succeeded in implementing the multilateral intellectual property rights regime through WTO to protect and promote innovation without assessing the innovation divide and the impact it could create in the third world. Internally, subscription to TRIPS regime altered the domestic Public health laws, the national drug policy and the patent system of WTO member states. For instance, India’s declared policy outlined by former Prime Minister Indira Gandhi in 1981 World Health Assembly in Geneva was reversed. Gandhi stated: “Affluent nations made huge investment in the health innovation system to alleviate the suffering and to prolong life of its citizens. The patents create proprietary rights for their innovations. But India never granted product patents because her policy was a better ordered world should not profiteer from life or death and medical discoveries would be free of patents”. The speech stressed the philosophy of 1970 Patent Act. Till WTO’s regime, India never granted product patents. Indian policy of a ‘better ordered world’ indicated that the benefits

produced by developed nations through huge investment in the health innovation system to alleviate the suffering and to prolong life of its citizens could be replicated in a developing nation like India, and India did not grant proprietary rights for their innovations in health. We could easily discern that WTO's patent regime, an externality, authored by the neo-classical economists and the international economic lawyers, or the unpopular 'law and economics' combination, has widened the innovation divide between the developed and developing nations, and restricted poor's access to advanced health technologies. What is suitable to first world may not be suitable to the third world making the neo classical economists' assumption that patent will be promoting innovation and economic growth fallacious and hence could not be applied to international relations or international community as a whole which is marked by the existence of an unequal world order. The theoretical domain of IR provides us with a trichotomous classification – Realism, Liberalism and Marxism – to interpret the international economic order. Concomitantly, World Systems Theory and the Dependency model that assesses the North South divide but belong to the Marxist theoretical strand explain the global innovation divide that exists in this world better for the theoretical framework developed by neoclassical economists is too narrow when it comes to analysing the drivers, processes and outcomes of innovation. However, the theoretical frameworks in innovation studies are premised upon neoclassical foundations.

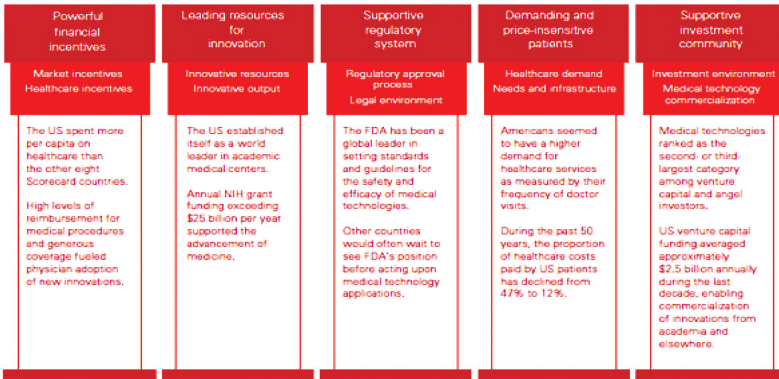
2. Major Innovation Frameworks in Health Innovation

There is no dearth of literature in innovation studies. Progress in the creation of an international comparative health innovation index is only gathering momentum. The indices or composite indicators conceived to measure aspects of national performance in 'innovation' included measures of entrepreneurship, scientific research, technology development, innovation in general, innovation in public sector organisations, and so on. But they remain underdeveloped or unexplored in health. Albeit, there are many methodological frameworks in the remit of innovation literature through which we could examine health innovation divide. These include Price water house Coopers (2011), Deloitte (2012), Global Innovation Index, and EU's Summary Innovation Index from the Innovation Union Scoreboard.

For instance, the Medical Technology Innovation Scorecard by the PricewaterhouseCoopers (PwC) explore the changing nature of healthcare innovation and adoptive capacity of nine countries like Brazil, China, France, Germany, India, Israel, Japan, UK and USA. The choice of nations is significant. It is taking only the developed and the developed among the developing nations for the case study. Besides, it examines where these countries stand relative to

“five pillars that have supported US medical technology innovation for the past several decades: powerful financial incentives, leading resources for innovation, supportive regulatory system, demanding and price-insensitive patients, and supportive investment community” (PwC 2011).

Five Pillars of Innovation



Source: PwC 2011:8

Fig. 2 Five Pillars of Innovation

PwC believes that these have supported medical technology innovation in the US in past decades. This may not be appropriate for developing country like India. (Eg., Patent law). For instance, it is the absence of patent law that provided a salubrious environment for generic companies to flourish in India through the process of reverse engineering. Surveys provide a glimpse of a few countries in a particular year have significant limitations.

Among these different frameworks, EU’s Summary Innovation Index from the Innovation Union Scoreboard is a better one, as it combines two parameters of our discussion themes – Health innovation divide and access to medicines. If we apply the EU’s Summary Innovation Index from the Innovation Union Scoreboard (IUS) to measure innovation divide between nations, we need to measure eight indicators. They are human resources, encompassing doctorate graduates, tertiary education and Lifelong learning; attractive public research systems that include international co-publications, most cited publications, foreign doctorate students; innovation-friendly environment having broadband penetration, opportunity-driven entrepreneurship; finance and support that sustain by public R&D expenditure, Venture capital investment; investment by firms, business R&D expenditure, non-R&D innovation expenditure, upgrading ICT skills; innovators that include product/process innovators, organisational/marketing innovators,

SMEs innovating in-house; linkages involving innovative SMEs collaborating with others public-private co-publications, private co-funding public R&D; intellectual assets like PCT patent applications, trademark applications, Design applications, etc. We need to assess the employment impact, ie., employment in knowledge-intensive sectors and the sales impact of medium & high tech product exports, knowledge-intensive services exports, sales of new to market & firm products.

EU's Summary Innovation Index provides a comparison of the EU to some of its main global economic competitors, Canada, Japan, South Korea and the United States and BRICS. As a representative from BRICS countries, besides Brazil, Russia, China, and South Africa, India was also compared with EU. Indian position is worrisome given the yawning gap in innovation between EU and India. The performance of India is below that of the EU, and the country is a Modest Innovator. The two areas where India has Relative strengths are Marketing and organisational innovation. The increase of performance has also been highest in Exports of knowledge- intensive services.

**Table 5: European Innovation Scoreboard 2017
Performance in 2010 and 2016**

INDIA	2010 Rel.to EU	2016 Rel.to EU	2010-2016
Doctorate graduates	6.8	5.9	-0.9
Tertiary education (25-64 year olds)	36.5	30.4	-6.1
International co-publications	18.7	19.8	1.2
Most cited publications	58.5	60.8	2.4
R&D expenditure public sector	82.5	76.1	-6.4
R&D expenditure business sector	21.4	23.8	2.4
Product/process innovators	50.8	57.8	7.0
Marketing/organisational innovators	121.8	139.5	17.7
Innovation collaboration	n/a	n/a	n/a
Public-private co-publications	1.9	2.1	0.3
Private co-funding public R&D exp.	n/a	n/a	n/a
PCT patent applications	32.9	32.1	-0.8
Trademark applications	66.5	74.5	7.9
Design applications	41.0	41.8	0.7
Medium & high tech product exports	42.1	48.5	6.4
Knowledge-intensive services exports	120.1	122.9	2.8

Table 6

STRUCTURE OF THE ECONOMY	INDIA	EU
Structure of the economy		
Share of employment in Agriculture, avg 2011-15	51.1	4.8
Share of employment in Industry, avg 2011-15	22.4	24.5
Share of employment in Services, avg 2011-15	26.6	70.7
Share of manufacturing in total value added, 2015	12.7	14.1
BUSINESS INDICATORS		
Top R&D spending firms per 10 mln population, 2011-15	0.2	29.9
- average R&D spending, mln Euros, 2011-15	134.9	165.8
Number of Unicorns (May 2017)	9	19
Buyer sophistication 1-7 (best), 2013-14	3.8	3.6
Ease of starting a business, Doing Business 2017	55.3	76.5
SOCIO-DEMOGRAPHIC INDICATORS		
GDP per capita, PPP (current int. \$), avg 2011-2015	5,300	36,500
Change in GDP between 2010 and 2015, %	38.6	5.3
Population size, avg 2011-2015, millions	1279.4	506.7
Change in population between 2010 and 2015, %	6.5	1.0
Share of population aged 15-64, avg 2011-2015	65.0	66.0

The Global Diffusion of Healthcare Innovation (GDHI) commissioned by the Qatar Foundation and produced jointly by Ipsos MORI – a market research organisation in the UK – and Imperial College London discusses an essential component of innovation – diffusion. The study examines the importance of a set of enablers and cultural dynamics. The project draws on 100 expert interviews and a survey of 1,521 healthcare professionals and 772 industry professionals across eight countries. Australia, Brazil, England, India, Qatar, South Africa, Spain and the USA.

A recent entrant into this list is Globelics report of 2016 on ‘Health systems strengthening: Rethinking the role of Innovations by Margrethe Holm Andersen and Rebecca Hanlin from Africalics. The Globelics network, which was founded by economists, has broadened to include scholars with a sociological or political science background to produce this volume. However, the report emphasizes on the organisational and process innovations – the social innovations – that are key to strengthening health systems in the poorest of the poor nations in the world. The report thus does attach importance of not losing an innovation edge in health technologies in international economic relations, ie., the competitiveness that nations like India and China should maintain with the developed world to continue

to serve as the pharma of the poor. We may note that there are only few nations from the third world like India that are capable to develop domestic production capacity in drugs and medical instruments. But for them the design of global rules of intellectual property rights is critical for what options they should go for. Political philosophers like Aristotle and John Rawls regard Protecting citizen's health- as a primary responsibility of nation. Both emphasized on ensuring equity in access to education and health. In recent times, Amartya Sen through his capability approach stresses the same.

3. The Indian Health Innovation System

Health care industry comprises hospitals, clinical trials, medical devices, telemedicine, outsourcing, medical tourism, medical equipment and insurance. Health care is huge business in India and is one of the largest sectors that provide employment and generate revenue. Having witnessed a compounded annual growth rate of 16.5%, the industry is having a size of about 160 billion US dollars by 2017. Indian health market is expected to emerge as a 280 billion US dollar market by 2020. It has 23% growth in medical tourism, which is valued at 3 billion US dollars. In 2016, about two lakh medical tourists visited India.

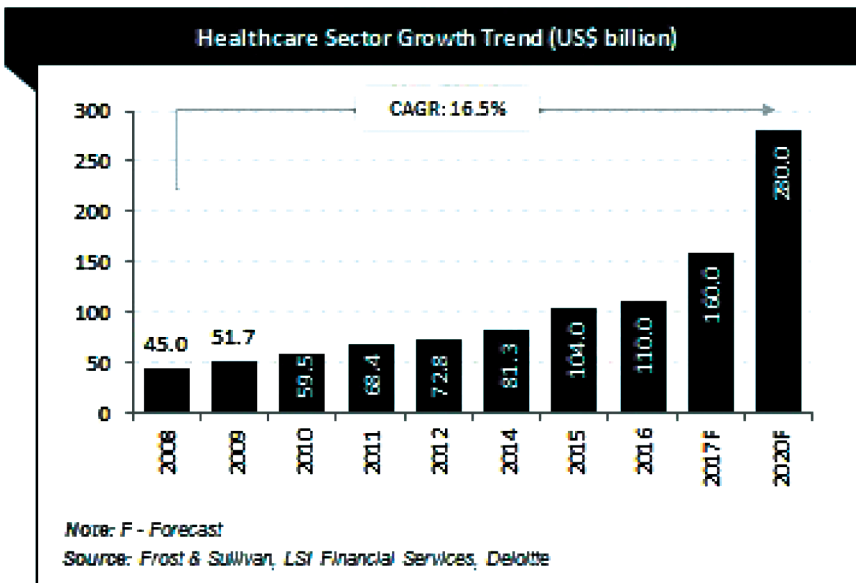


Figure 3

From an IR perspective, the major determinant that create the innovation divide in the world into two blocs North and South and access to medicine is the exorbitant price on life saving patented medicines. The North are net exporters of IP and the South net importers, and there is always a skewness in North's favour. The drug price determines access to medicines. In India, thirty-two and a half million people fall below the national poverty line by making out-of- pocket payments for health care in a single year. These direct out of pocket payments are made for utilization of health services and purchase of drugs. Out of total medical expenses, expenditure on modern (allopathic) medicines account for 68% in rural areas and 64% in urban areas. India's public expenditure is woefully small hovering around 1 per cent of its GDP despite the fact that it accounts for one-fifth of the global disease burden. Medicines are thus critical to our healthcare system compared to advanced countries, where cost of medicines in healthcare expenditure is much less significant.

Indian healthcare delivery system consists of two players - public and private. India has 3,598 hospitals and 25,723 dispensaries across the nation. They offer different types of treatment - Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy – popularly termed as AYUSH. This ensures alternative medicine treatment for the public. The public healthcare system comprises limited secondary and tertiary care institutions in key cities. For the rural areas the system has the primary healthcare centres (PHCs). The private sector provides majority of secondary, tertiary and quaternary care institutions. However, they concentrate mostly in metros, tier I and tier II cities. Public spending incurred by both states and central government accounts for 28.6 per cent of the total health expenditures (NHA 2013–14). The decline in outpatient and hospitalisation care in India in the past 20 years has also led to the rise of private players. While healthcare costs have shot up manifold in private sector, absence of sufficient government health infrastructure increasingly coerce patients to depend private sector for procuring drugs and diagnostics. This some times makes the health expenditure catastrophic³ pushing the patients below poverty line every year (Selvaraj and Karan 2009).

Table 7: Distribution of Public and Private expenditure on health in Selected states in 2010

State	Percentage of Public expenditure	Percentage of Private expenditure
Himachal Pradesh	37.8	62.2
Assam	30.9	69.1
Rajasthan	30.4	69.6

Karnataka	28.9	71.1
Jammu & Kashmir	25.5	74.5
Tamil Nadu	23.9	76.1
West Bengal	23.4	76.6
Orissa	23.0	77.0
Maharashtra	19.4	80.6
Gujarat	18.0	82.0
Andhra Pradesh	17.5	82.5
Punjab	16.8	83.2
Madhya Pradesh	15.2	84.8
Kerala	12.9	87.1
Bihar	11.8	88.2
Haryana	10.4	89.6
Uttar Pradesh	7.5	92.5

Source: National Health Profile(2011).

India also known as the pharma of the poor produces over 80 per cent of the antiretroviral drugs used globally to combat AIDS. Its advantage, till becoming a member of WTO in 1995, lied on the 1970 Patent Act, which accepted only process patent and not product patent. Its phama companies succeeded in procuring high number of Abbreviated New Drug Application (ANDA) approvals. Although concentrated in certain clusters, India has demonstrated rich expertise in pharmaceutical and biotechnology, information technology, medical devices, and the built environment (design, engineering and construction) – drive much of the innovation that takes place in healthcare. But Non-communicable Diseases(NCDs) account for nearly half of all deaths in India. Considering the high cost of medicines and longer duration of treatment NCDs constitute a greater financial burden to low income groups (Planning Commission n.d).

Access to Health Technologies: The case of Cancer

It may be noted that all the potential innovations in life sciences and medical technology are not taken up into everyday practice in healthcare, even when they are shown to be beneficial. We need to develop appropriate and affordable health technologies and novel business models to abridge this divide (Oliveira, et al. 2017). Many innovations are not accessible because of three reasons primarily. They are:

1. Unaffordable due to high expenditure.
2. Unavailable due to non-diffusion of technology.
3. Unsuitable for their health systems because of absence of interest and hence less R and D., eg., research in tropical diseases (R and D divide).

Cancer provides the best example of cost of medicines preventing people from getting treatment. Globally it is the second leading cause of death, and was responsible for 8.8 million deaths in 2015. Globally, nearly 1 in 6 deaths is due to cancer. Cancer is a generic term for a large group of diseases that can affect any part of the body. One defining feature of cancer is the “rapid creation of abnormal cells that grow beyond their usual boundaries, and which can then invade adjoining parts of the body and spread to other organs, the latter process is referred to as metastasizing”. It is a leading cause of death worldwide, and account for 8.8 million deaths in 2015. The most common causes of cancer death are cancers of: Lung (1.69 million deaths), Liver (788 000 deaths), Colorectal (774 000 deaths), Stomach (754 000 deaths) and Breast (571 000 deaths) (WHO 2017). In 2012, 14 million new cases are reported, and it is further expected that there would be a 70% increase in the next two decades.

What is worrisome is the fact that more than 60 percent of the world’s total new annual cases occur in Africa, Asia, and Central and South America. These regions experience 70 percent of the world’s cancer deaths. “In low-and middle-income countries, treatment for cancer is not widely available. Health systems are often not equipped to deal with detection and treatment of cancers. Prevention and early detection programmes are often weak or non-existent. This situation is exacerbated in some cases by the high cost of treatment and in particular the high cost of newer cancer medication. The unsustainability of cancer medication pricing has increasingly become a global issue creating access challenges in low-and middle-income but also high-income countries” (Hoen 2014)

In India access to cancer treatment is determined by the heavy price of the drug not affordable to population with lower income. Most of the drugs for cancer treatment are patented and the prices are very high, making the health policy-makers scared during the transition period that immediately succeeded Indian subscription to TRIPS in 1995. India, as a WTO member was given a transition period of five years, but was supposed to create a ‘mail-box’ that kept patent applications in the pipeline. It was feared that generic medicines that are already produced and marketed in India for which patent application are pending in the mail-box, would go off the market once the patent is granted, leading to a quantum jump in drug prices. The Glivec, the anti-cancer drug (Imatinib mesylate) for which the Swiss MNC Novartis obtained exclusive marketing rights in 2003, was priced ten times higher than that of its generic counterparts. The price tag of Novartis was \$27000 per person for one year whereas the Indian generic equivalents produced the same for \$2700 per person for one year. However, the third amendment brought by the Government of India affirmed that those Indian companies already producing medicines for which applications are filed in the mail-box can continue

to produce them even after patent is granted to the drug, after paying a royalty to the patent owner. This allayed fears to a great extent. (Kumar 2014).

Radiotherapy, chemotherapy and surgical treatment, are the major forms to treatment of different types of cancers. The former two types of cancer treatment options are used extensively for the treatment of almost all types of cancer. It could also be a combination of all. The major impediment that creates access divide is the astronomical cost of treatment. "The costs include a lymph node biopsy, a bone marrow test, an endoscopy, a PET scan, special anticancer drugs and six cycles of chemotherapy. Each chemotherapy sitting costs Rs 90,000. This prohibitive cost wiped out entire life savings and even forced some people to sell their homes." Although relatively cheaper than in the West, cancer treatment is still unaffordable for poor and middleclass Indians, who often do not have health insurance. "It could cost as low as Rs 2.5 lakh for six months of treatment, with some of the lowest priced generic drugs in the world, to as high as Rs 25 lakh, with novel drugs and targeted medicines." Targeted treatment drugs for breast cancer, such as Herceptin or Herclon, made by global major Roche cost around Rs 75,000 for a course. A patient could need up to 17 courses costing more than 10 lakhs (Sharma 2013).

The high cost of cancer treatment makes it inaccessible for the poor and a major public health concern in India. "It is estimated that there are about 28 lakh cases of cancer at any particular point of time with 10 lakh new cases occurring every year. About 5 lakh deaths occur annually in the country due to cancer (Planning Commission n.d). However, in spite of these high costs, India is also a favourite destination of medical tourism. Its cost is lowest compared to that of developed nations and acts as a space of traction to the citizens, particularly from the developing nations like Nigeria or Indian expatriates working particularly in the Gulf. The cost of cancer treatment in India is less than the half of what it costs in other Western countries that offer similar level of medical care, including the UK, US, Singapore and the UAE. The best hospitals in India are at par with any other leading hospitals in the world and are equipped with the latest technology used for the treatment of cancer patients.

The top cancer treatment hospitals in India such as Medanta The Medicity, Apollo Hospitals, Fortis and Max Healthcare house some of the best oncologists in India, but comes under the private sector, which are beyond the reach of a common man. Poor patients, who cannot afford private hospital are in the waiting list of public hospitals, whose numbers are limited. Even if they are available, there is a long queue denying timely treatment of patients and where availability of modern gadgets are limited. It is not the drugs alone but the price of imported equipments increase the cost of setting up cancer hospitals. For example, 'a linear accelerator, which is used for radiation therapy, costs around Rs 10 crore, plus an import duty

of around Rs 1 crore. Similarly, a PET CT scan machine, used to pinpoint the location of cancers, is anywhere between Rs 3 crore and Rs 6 crore. The costliest is a CyberKnife used for radiotherapy. It costs around Rs 30 crore' (Sharma 2017).

Inside India also we could see the existence of great regional innovation divide, i.e., disparities among different regions vis-à-vis accessibility to facilities that prevent better treatment and early detection of cancer. It may be noted that regional health innovation system is of paramount importance and it is regarded as a public good by many. For instance, the cancer patients from Punjab travel to Bikaner for cancer treatment. "Every day, the dimly lit and shabby Bhatinda railway station in the Indian state of Punjab comes to life sharp at 9 pm. The reason? The arrival of a passenger train that's been long christened as the Cancer train on platform no 2... The train leaves Bhatinda around 9.25 pm and covers a distance of about 325 km with 26 halts to reach Bikaner in the Indian state of Rajasthan at 6 am. The most remarkable feature of this train is that 60% of its population are cancer patients of all ages who come from all across Punjab. This 12-coach train has gained its name from a sudden increase in cancer cases in Punjab that many blame on pesticide use, growing pollution and hardly any response by authorities. All the patients aboard the train undertake this journey to visit Acharya Tulsi Regional Cancer Hospital and Research Centre in Prince Bijay Singh Memorial Hospital, in Bikaner, which like many hospitals in Punjab is also covered for benefits under the Mukh Mantri Punjab Cancer Raahat Kosh Scheme (MMPCRKS)... [I]t is incredibly hard to avail the cash incentives under MMPCRKS in Punjab without any political connection and that the poor are almost always neglected in the government hospital in the state has also attributed to patients taking to the hospital in Bikaner, which is one of the country's 19 regional cancer research centres and for the cancer-stricken in Punjab, the nearest place where treatment is free, and medicines cheap" (Das 2016). Similarly, the Cancer Institute at Adyar, Chennai, which was started in 1954 from a thatched shed with 12 beds, is having 423 beds now. Housed in two campuses, the Institute is a centre of traction for patients from all over the country. The driving force behind the Centre is Dr. V. Shanta, who was awarded many awards like the Padma Vibhushan in 2016, Padma Shri in 1986, Padma Bhushan in 2006, and the Magsaysay Award in 2005 for public service. She provided significant contributions to make one of the prominent regional innovation systems in India. "It is like a brand, earning instant recognition and smooth entry for its alumni in professional placements nationally and globally" (Ganesh 2016).

The world accepted TRIPS agreement, as a 'necessary evil' was to promote innovation in spite of its contradictions with perfect competition and human rights. It provided flexibilities with clauses on compulsory licensing and parallel imports. Positively, compulsory licensing promotes innovation in nations, which

uses it because it involves knowledge transfer. Negatively, it could serve as a recipe for sanctions in foreign direct investments as a response to the use of compulsory licensing (Beyer 2013). North's superiority over South in power parity and the fear of diplomatic arm-twisting scared the latter from making use of compulsory licensing. However, in November 2001, WTO's Doha Declaration on TRIPS and Public health attempted to address this innovation divide among the Member nations. The special Ministerial Declaration adopted at the WTO Ministerial Conference in Doha contained two clauses –compulsory licensing and parallel imports. Paragraph 4 of Doha declaration declares that the TRIPS agreement “can and should be interpreted and implemented in a manner supportive of WTO Members' right to protect public health and, in particular, to promote access to medicines for all”. Paragraph 5 reaffirms that addresses the issue of parallel importation a nation's right to opt 'compulsory licensing' and the freedom to determine the grounds upon which such licences are granted. It also affirms the right of a member with insufficient or no manufacturing capacities in pharmaceutical sector to import from other nations without the consent of the patent-holder of a patented product marketed in another country either by the patent holder or with the patent-holder's consent (Kumar 2014)

Conclusion

The stark global innovation divide that exists in the health innovation system restricts poor's accessibility to the magic of modern medicine. The new TRIPS agreement was accepted as a 'necessary evil' was to promote innovation though, the gap in accessibility to life-saving patented medicine between the citizens in developed in developing nations is widening. The arguments that patents foster innovation in developing nations were premised upon the foundations of classical-economics, which failed to differentiate between the divide that existed between the North and South. The Indian health innovation system, which was not able to produce generic version of latest cancer medicines, testifies this.

Notes

- 1 Not necessarily all parts of these nations display turn out to be diffusers – but 'much of China', 'a large and increasing part of India', a large part' of Mexico, etc.
- 2 Life expectancy is a statistical measure of the average time an organism is expected to live, based on the year of their birth, their current age and other demographic factors including sex.
- 3 Catastrophic health care expenditure implies the high levels of out of pocket health expenditure that might affect household's standard of living. It is defined as that level of out of pocket health expenditure, which exceeds some fixed proportion of household income or household capacity to pay. According to Berki (1986) catastrophic

expenditure is one which constitutes large part of household budget and thus affects household's ability to maintain customary standard of living.

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The Theme of Orientalism and Perspectives of Edward Said and Bernard Lewis

Premanand Mishra

Western scholarship on Islam and “Middle East” locates itself in a revolutionary change with critique of Orientalism that came from Edward Said in his most famous work *Orientalism*. His critique of Orientalism changes the Orientalist discourses in how Islam has been perceived, constructed, imagined and distorted in its representation with discernible facts in Foucauldian sense with ‘regulated system of thought.’

Orientalism, Islam and Perspective of Edward Said

Edward Said lived through with his Palestinian ancestry, someone who knew the region, its past, its history and culture quite well. As Albert Hourani finds that “Scholars don’t work in abstraction their minds are formed by the culture of their age and previous ages and they bring to the task of interpreting what they have extracted from their sources principles of selection, emphasis and arrangement derived from the ideas and convictions their lives have taught them” (Hourani 1991:1). When one looks into intellectual history of critical discourse of the last half century, the work of Edward Said will be identified as very important and influential especially his critique of Orientalism will be regarded profoundly significance that revolutionized how the West has discovered Islam and the Oriental world.

Orientalism has been defined by different scholars and intellectuals differently. The semantic and notions about Oriental world isn’t attached to any particularly geography. In Michael Curtis’s word, the term has Latin origin and “traditionally, in Western European parlance the term refers to the area of what is now called the Middle East, or, alternatively, the Near East. The adjective Oriental similarly refers to the peoples and cultures of those countries” (Curtis 2009:2).

For Said Orient is an intellectual source of European civilization. For him, “such locales, regions, geographical sectors as ‘Orient’ and ‘Occident’ are man-

made. Therefore, as much as the West itself, the Orient is an idea that has a history and a tradition of thought, imagery, and vocabulary that have given it reality and presence in and for the West. The two geographical entities thus support and to an extent reflect each other” (Said 2003a:5).

Orientalism as an idea and even as a concept in many scholars’ view is not discovered only after Edward Said but the glimpses and footprints were always there. Gyan Prakash refers the works of Anwar Abdel Malek V. G. Kiernan and Bernard S. Cohn who traces relationship between European and its colonies. But it was Said’s contributions to Orientalist discourse as a critique that “opened the floodgate of postcolonial criticism that that has breached the authority of Western scholarship of other societies” (Prakash 1995:199; Ramakrishnan 1999).

How one culture is represented and how it becomes as a subject to its ruler in Western notion of if its oriental world is close to Said’s critique of Orientalism. It was Edward Said who tries to find the true meaning of Orientalism beyond its semantics. He draws a sharp difference between an ‘academic Orientalism’ and general meaning of it. Said defines Orientalism as “a way of coming to terms with the Orient” (Said 2003a:1).

As he defines:

“The most readily accepted designation for Orientalism is an academic one, Anyone who teaches, writes about, or researches the Orient.... is an Orientalist, and what he or she does is Orientalism” (Said 2003a:2). The general meaning of it “is a style of thought based upon an ontological and epistemological distinction made between ‘the Orient’ and the Occident..... Here I come to the third meaning of Orientalism, which is something more historically and materially defined than either of the other two. Taking the late eighteenth century as a very roughly defined starting point Orientalism can be discussed and analysed as the corporate institution for dealing with the Orient—dealing with it by making statements about it, authorizing views of it, describing it, by teaching it, settling it, ruling over it: in short, Orientalism as a Western style for dominating, restructuring, and having authority over the Orient” (Said:2003a:2-3).

The critique of Orientalism by Edward Said is very helpful in understanding the Western discourses on Islam. How the superior West able to project its inferior ‘other’ by regulated system of knowledge through its own imperialist history and making of an image of Islam and the Muslim world. He uses Foucault in his understanding of discourse. He believed in this fact the difference between the Oriental and Occidental world is not complex but it manifest the layers of degrees of complex hegemony and it is because of systemic domination and power that works through in producing the knowledge by a superior power over other.

Said’s critique of Orientalism gives us a magnificent lens through which one able to focus and decode the complex relationship of European hegemony that seeps through under academic discourse over its orient ‘others’. This lens postulates and

finds a clumsy coordination between financial and political institutions that creates a false wisdom through by a constant and manufactured display of Orientalist discourse against its imagined feminine ‘others’ mainly Islam and the Arab world.

As Said remarks:

After all, any system of ideas that can remain unchanged as teachable wisdom (in academies, books, congresses, universities, foreign-service institutes) from the period of Ernest Renan in the late 1840s until the present in the United States must be something more formidable than a mere collection of lies. Orientalism, therefore, is not an airy European fantasy about the Orient, but a created body of theory and practice in which, for many generations, there has been a considerable material investment. Continued investment made Orientalism, as a system of knowledge about the Orient, an accepted grid for filtering through the Orient into Western consciousness, just as that same investment multiplied—indeed, made truly productive—the statements proliferating out from Orientalism into the general culture(Said 2003a:6).

Said’s work, *Orientalism*, *Question of Palestine* and *Covering Islam*, which he calls as trilogy is pioneer and profoundly significant in deconstructing the Western notions about Islam. In *Orientalism*, he touches upon the factors that significantly contributed in Western perception of Islam and the Arab world. The image about Islam in Said’s idea was ‘highly politicized’. Said finds the history of Orientalism as a strong reflection of the constant prejudices against Islam. One of the most, indelible facts of such politicized notion of Islam is the long history of Arab Israeli conflict in the Arab world.

Said explains why he wrote *Orientalism*:

The struggle between the Arabs and Israeli Zionism, and its effects upon American Jews as well as upon both the liberal culture and the population at large; three, the almost total absence of any cultural position making it possible either to identify with or dispassionately to discuss the Arabs or Islam. Furthermore, it hardly needs saying that because the Middle East is now so identified with Great Power politics, oil economics, and the simple-minded dichotomy of freedom-loving, democratic Israel and evil, totalitarian, and terroristic Arabs, the chances of anything like a clear view of what one talks about in talking about the Near East are depressingly small(Said 2003a:26-27).

Said believed that American Orientalism compare to British and French has been more indirect as they never had any colonial history in this region and thus there is more of highly politically motivated piece of ignorance prevailed that lead to depressingly unanimity against the question of Palestine. Said had this notion that why the Zionist project has created an attempt to recognize the existence of Palestine people. He dwell this in *Orientalism* as “The nexus of knowledge and power creating ‘the Oriental’ and in a sense obliterating him as a human being is therefore not for me an exclusively academic matter. Yet it is an intellectual matter of some very obvious importance” (Said 2003a: 27).

The unresolved relationship between Christian Europe and Islamic Arab world found a new trajectory of political differences with the advent of American Orientalism and formation of a Jewish state of Israel. The anachronistic historical traditions of religious and cultural differences remain as an acute attitude problem in the West towards the Islam and Arab world. Said (2003) explains it succinctly, “The closeness between politics and Orientalism, or to put it more circumspectly, the great likelihood that ideas about the Orient drawn from Orientalism can be put to political use, is an important yet extremely sensitive truth. It raises questions about the predisposition towards innocence or guilt, scholarly disinterest”(Said 2003a: 96). Said points out and traces on the seething conflict between Islam and the West. The rise of Islam and fall of Rome stayed subconsciously in the European mind in its age of past and so did remain in the present. Said intellectually brings Edward Gibbon works, “*Decline and fall of the Roman Empire*” to trace this complex relationship.

He observes:

Doubtless Islam was a real provocation in many ways. It lay uneasily close to Christianity, geographically and culturally. It drew on the Judeo-Hellenic traditions, it borrowed creatively from Christianity, it could boast of unrivalled military and political successes. The Islamic lands sit adjacent to and even on top of the Biblical lands; moreover, the heart of the Islamic domain has always been the region closest to Europe, what has been called the Near Orient or Near East. From the end of the seventh century until the battle of Lepanto in 1571, Islam in either its Arab, Ottoman, or North African and Spanish form dominated or effectively threatened European Christianity(Said 2003a:74).

Said was neither a theologian nor a philologist and not even an expert on Islam but his ideas and his works had changed how Islam should be seen, studied and covered in western media He challenged those regressively and depressingly systematized notion of Islam carried through a wrong and biased history. It was an idea against an unimaginably polluted discourse on Islam both politically and intellectually by Orientalist historians in the West. His critique on Orientalism was not just a masterpiece, which gave a new canvass to different disciplines but perhaps gave birth to new disciplines as well such as Post colonialism.

Said’s *Orientalism* changed the whole discourse on Islam in the West. It wasn’t a surprise the vast literature on Islam came after his work set on a different trajectory of a departure from the conservative orientalist approach of nineteenth and twentieth centuries. In *Orientalism* he discusses the Orientalist historian understanding of Islam to prove his thesis without being biased. He discusses Carl Becker, Louis Massignon, H.A.R Gibbs and Bernard Lewis.

He discusses Carl Becker’s notion of Islam being an inheritor of Hellenistic tradition failed to imbibe the humanistic tradition of the Greeks and therefore one

shouldn't take Islam as an original religion but a distortion that couldn't get comfort by Greek Philosophy and finds no creativity that can match European Renaissance. Said also brought French Orientalist historian Louis Massignon's idea on Islam. Massignon had this notion that Islam is a religion that resisted the incarnation theory of Christianity and one who disowns their own greats like Muhammad and Averroes (Ibn Rushd) but rather a controversial figure of Al Hallaj who was crucified for daring to personalize Islam.

Said finds that both Becker and Massignon, was mainly finding linkages with Islam in western thoughts and tried to regularize it in the same terms in a way it was compromised and "weighted heavily with all the orthodox attitudes, perspectives, and moods of Orientalism that I have been describing. His Orient is not the Orient as it is, but the Orient as it has been Orientalized" (Said 2003a:104). He traces their intellectual submissions and question the methods used which Said calls as "An unbroken arc of knowledge and power connects the European or Western statesman and the Western Orientalists; it forms the rim of the stage containing the Orient" (Said 2003a: 104).

Said disputes with known Orientalists, from Ernest Renan, Goldziher, Macdonald, Von Grunebaum, Gibb, to Bernard Lewis and questions their construct of Islam just as in P.M. Holts's word as 'cultural synthesis' and an attempt to disengage it from economics, sociology, and politics of the Islamic peoples and their life. As Renan projects Islam as 'tent and tribe' where Gibbs essentialize it as a paradox within the Arab mind of dissociating oneself with rationalist thought process which in Said's understanding is nothing but a pure 'Orientals'.

As Said argues, "The rejection of rationalist modes of thought and of the utilitarian ethic which is inseparable from them has its roots, therefore, not in the so-called "obscurantism" of the Muslim theologians but in the atomism and discreteness of the Arab imagination. This is pure Orientalism" (Said 2003a:106). Western notion of Islam was hugely supplied with such stereotyping images that designated Islam as a religion hasn't crosses into modern times and in a way it frozen in times. It didn't advance into modern times and became more static that did not match with Western advancement of life based on reason since renaissance. Such distortion became hallmark of modern display of Orientalist discourse on Islam.

For Said, modern structure of Orientalism post enlightenment in Europe can be chronicled as a constituent of its history, its trajectory of proliferation, how it has been classified in general terms as well as the sort of sympathy it has earned. Such notion of Islam can be visualised in the realm of eighteenth century European thoughts. The genealogy of such intellectual excavation of modern Orientalism in its ontological and institutional structure reflected in Western discourse on

Islam. For Said, “Without them Orientalism, as we shall see presently, could not have occurred. Moreover, these elements had the effect of releasing the Orient generally, and Islam in particular, from the narrowly religious scrutiny by which it had hitherto been examined (and judged) by the Christian West. In other words, modern Orientalism derives from secularizing elements in eighteenth-century European culture” (Said 2003a: 120).

Any attempt of disrespect, distortion, dehumanizing of other culture and its subjects falls into such category that can be hinted as limits of Orientalism. But in Said’s (2003) own tryst with “Orientalism advanced to an another step than that: it views the Orient as something whose existence is not only displayed but has remained fixed in time and place for the West” (Said 2003:108).

Coverage of Islam and Orthodox vs Antithetical Debate of Edward Said

In *Covering Islam: How The Media and Experts Deter How We See The World*, Said carries his intellectual work in determining how media in general has covered Islam, Middle East and anyone who directly or indirectly belongs to such constituencies. His major argument how the construction of notions about Islam and the ‘Middle East’ in the West and particularly in United States categorised it into some compartment ship where it mirrors terrorism and Muslims in general are terrorist. Such stereotyping in regular basis presented by both popular media and its associated experts really essentialize the discourse as worst form of Orientalism.

Said (1997) traces such notions and claims that it is unequivocally true that many such incidents and events in late seventies such as Iranian Revolution, the 1983 bombings in Lebanon, and Salman Rushdie affair in late 80’s helped such perverted construction of image of Islam that clothed ingrained sense of odium against the West. For Said, there were elements of truth in that with the rise of Islamic power either in Algeria , Sudan or Iran, such manifestations cemented those exclusives arguments that make an image of Islam as nothing but a store house of terror and any who has been involved to be with the region or this religion; somehow deserves a negative portrayal. That is how Said tries to deconstruct in Norman Daniel’s (1960) word ‘making an image of Islam.’

Said contemplates his argument, how the malicious campaign in the media, talk shows and by the self-appointed experts on Islam revived the canonical understanding against Islam by harbouring new set of Orientalism that threatens in Said’s own word(1997), ‘western consciousness’. The mention of Libya, Iraq, Bosnia and massive war broadcast live on *CNN* did manage to form an image where it reflected how the Muslim world is in rage and in a war with Christen West. That was not only factually incorrect but clear case of propaganda that further helped

in widening gulf between the Muslim world (countries that inhabited Muslim majority) and the West. The outcome was less dialogue and more polarity in the relationship. In Said's own account, "To most Americans, Islam was nothing but trouble" (Said 1997:XV).

The process of equaling Islam with fundamentalism or with terrorism is so generalized that any attempt to disqualify such claims becomes itself a victim. One of the most fundamental issues that Said argues in *Covering Islam*, is how the media in general attached Islam with all sort of synonyms with violence and essentializing it just as a unique religion that begets hatred for non-Muslims. But never ever media or experts who love to write volumes on such issue doesn't care to find details in their research about Muslims societies their sociological condition and different geographies where Muslims lives. Such essentialization will not be attached with any other religion but Islam to create a panic among people who gets to see such images that horrifies them and in a process they accept the way media portrays, which is everything but reality.

Said sumptuously brings experts like Daniel Pipes, Bernard Lewis and top policy makers in the government through their polemicist ideas to create a monster image of Islam through continuous abuse by calling and attaching Islam with Fundamentalism without checking facts and without caring to define the loaded words to convince their argument intellectually but they manage to draw good reviews through media that help such academicians and experts in jingoist and sacrilege attack on Islam.

In Said's idea, Western construction of Islam has been largely driven by dishonesty and orthodox understanding by not fringe groups but mainstreams to believe that it is in a war with Islam like with communism. Said observes, "In short, fundamentalism equals Islam equals everything-we-must-now-fight-against, as we did with communism during the Cold War; in fact, Pipes says, the battle is graver, more profound and dangerous with Islam" (Said 1997:XIX). Said draws this image about Islam propagated through media due to a special relation between Israel and United States. There is a truth that Israel lobbies massive campaign through media, publication houses to continue to portray this image about Islam and the violent Arab world that helps their cause in justifying their illegal occupation in Palestine.

Said doesn't accused anyone of Islamophobia through his works and minces no words in clarifying it for those who finds his argument biased. He doesn't support any acts of violence done by Muslims at large against any Israeli or Westerners in the name of Islam but questions the mere selection of facts and overlooking the circumstances before projecting Islam as a problem. Through *Covering Islam* Said's traces how knowledge and power works in a system of thought that creates a discourse. Here Said navigates through his ideas on how Islam is covered through

such discourses which is central to how knowledge is produced and how powers play an important role in producing such knowledge. His notion of power and knowledge inquires how political interpretation of Islam is deeply divided between 'orthodox' and 'antithetical knowledge'.

Said's (1997) main argument was: can one culture will ever be able to produce equal knowledge about other and how scientific that would be? In Saidian notion knowledge is not innocent and how knowledge is produced in any discourse is dependent on multiple enterprises that helps in creating such knowledge. For Said (1997), Compare to French and British Orientalist discourse which had a proximity of knowing each other culture and therefore despite an orthodox and regressive notion of discourse on Islam in West there were few Orientalist historians such as Maxime Rodinson and Albert Hourani who managed to identify the critical and scientific notion of knowing other culture without being biased in a way they were more antithetical in producing history of oriental world. But Said's major issue was with American Orientalism.

According to Said (1997) American Orientalism is mainly strategic. How knowledge is produced through the realm of area studies in different universities and its association with strategic interest of private companies as well as government agencies is the main problem and it is this orthodox methodology, which is central in projecting Islam as an enemy. Said helps in understanding that there is noxious sense of notions that has been created in the Western discourses on Islam that have been institutionalized suggesting that objective knowledge is achievable sans any proximity to its geography. What it suggests is: time and space is not a necessary locus through which one need to understand Islam and the Arab world. As said reminds, "For the general public in America and Europe today, Islam is "news" of a particularly unpleasant sort. The media, the government, the geopolitical strategists, and although they are marginal to the culture at large the academic experts on Islam are all in concert: Islam is a threat to Western civilization" (Said 1997:144).

However, Said never claims that every knowledge that has been produced in the West on Islam is polluted with hatred or derogatory in nature but he draws a fine line. Said (1997) suggests that if any society where a section has the 'will to propagate' then a prevalent notion of distorting images becomes more prevalent. Said's approach to orthodoxy engages structural and institutional power that attaches discourse with Power. Here economic and strategic interests, government policies, association with hawkish nationalists group and such independent think tanks that creates and influences policy making. IN more than any example of orthodoxy is in the coverage of Islam and the Arab and Islamic world.

Universities creates human resources which can be helpful for such structure rather any unbiased honest and object academic and critical discourse on how knowledge should be comprehend in understanding different culture and civilization. This is mostly visible in western discourse especially in American Orientalism in its approach towards Islam. The other side of Saidian notion of knowledge is antithetical; a methodological approach of disengagement from the existing orthodoxy in academia media or multiples agencies that is associated in knowledge production or creating a discourse.

Said (1997) points out three important types of antithetical knowledge of Islam: First is the young scholar who is more in objective than their seniors and more open to seek neutral truth. They are more a specialists than a generalist and prefer critical approach of understanding such structural anthropology, quantitative methods, and Marxist modes of analysis with real interest and often successful applications. They seem especially sensitive to the ethnocentric forms of Orientalist discourse, A second group is group of antithetical writers on Islam is that almost none of them belongs to the establishment in Middle East studies. This is not to say that they are not distinguished and respected figures; they are, but few if any of them have been actively and institutionally involved as consultants to governments or to corporations.

Lastly, there is a group of writers, activists, and intellectuals who are not accredited experts on Islam but whose role in society is determined by their overall oppositional stance: these are the anti-war and anti-imperialist militants, the dissenting clergy, the radical intellectuals and teachers, and so on. Their insight into Islam has very little to do with the wisdom of Orientalists, although some of them have been influenced by the cultural Orientalism that is to be found everywhere in the West

Orientalism, Islam and Perspective of Bernard Lewis

Bernard Lewis is revered as one of the most profound historian in the West on Islam and Turkish history in Particular. Orientalism as a discourse in the West has been hugely influenced by his large contributions of works and thus acknowledged in the West as one of the finest historian on the “Middle East”. Bernard Lewis had this notion about history is that It is full of interpretation but any interpretation as he writes must dismiss inaccuracy. He points, “Inaccurate history is no history at all and people can be brought up on myths and illusions”(Lewis 2013: 140).

He had this idea that every culture and civilization reaches out to study and understand others civilization but few civilizations fail to acknowledge such and Islam is highly placed in that. He had this notion about Muslims that they do not prefer to read other’s history though it is a matter of debate which can be discussed

in length but not the scope of study in this discourse. But this perception too is open to interpretation and can be accused as equally an inaccurate understanding. His exchanges with Edward Said on Orientalism has changed the discourse in the West which will be discussed in details but importantly for Lewis how he understands Orientalism is important to know. He understood Orientalism as an extension of classicist by which he meant a study of Hellenistic, Latin and other old linguistic history.

According to Lewis, “the word Orient is vague now and Orientalists who designated to philological method as other classicist has now long fallen out of any use with the birth of new disciplines” (Lewis 2013:268). For him Orientalist discourse is long dead and deserted as ‘obsolete and inaccurate’. For Lewis Orientalism has lost its meaning because it has been polluted and thus does not merit into any rational discourse as it has been used previously. For him Orientalism in the past has two meanings.

He remarks:

In the past, Orientalism was used mainly in two senses. One is a school of painting that of a group of artists, mostly from Western Europe, who visited the Middle East and North Africa and depicted what they saw or imagined and the second, and more common meaning has hitherto been a branch of scholarship. The word, and the academic discipline which it denotes, dates from the great expansion of scholarship in Western Europe from the time of the Renaissance onward (Lewis 1993b:101).

For Lewis Orientalism lost its importance long before the current debate that came after Said’s *Orientalism*. He (1993) founds there is an inaccuracy and dishonesty that seeped through unnecessary debate on this which doesn’t have any relevance but even formally abandoned during the hundredth anniversary of the First International Congress in Paris in 1973. For him, “the term ‘Orientalist’ was thus abolished by the accredited Orientalists, and thrown on the garbage heap of history. But garbage heaps are not safe places. The words ‘Orientalist’ and ‘Orientalism’, discarded as useless by scholars, were retrieved and reconditioned for a different purpose as terms of polemical abuse” (Lewis 1993b:104).

Lewis has been acknowledged as in Said’s word as the ‘leader of the Orientalist’ which Lewis not only refutes but calls it ignorance and polemical abuse (Said 1997 & Lewis 2013). But Western discourses on Islam locate Lewis’s work in its center not only because he is being accused of being an Orientalist or has shown Islam in bad light but his works have immensely influenced public policy in the West especially in the United States. He has been called no less an authority when it comes to Islamic history and the history of the Arab world and importantly so on his massive work on the history of the Ottoman Empire.

Thus, his perspectives are important for any attempt to locate Islam in Western discourses. For Lewis contemporary notion of Islamic history and crisis in it must be visited with this idea that in what went wrong with Islam? He narrates such claims is exhaustively in *Crisis in Islam* and *What Went Wrong?*

He observes, “Islam, far more than Christendom, was the intermediate stage between the ancient East and the modern West, to which it contributed significantly. But during the past three centuries, the Islamic world has lost its dominance and its leadership, and has fallen behind both the modern West and the rapidly modernizing Orient. This widening gap poses increasingly acute problems, both practical and emotional, for which the rulers, thinkers, and rebels of Islam have not yet found effective answers” (Lewis 2003:17).

The Western notions of Islam in Lewis’s idea came as fear, greed, curiosity and disquiet and the relationship between the two civilizations is a testimony of conquest and attacks. Bernard Lewis praises Christen West and its civilization is the only known civilization that has taken a genuine and intellectual effort to study about other culture mainly Islam but the contrary is not true.

He explains:

The first civilization known to history which seriously undertook the study of others not in order to conquer or convert them but merely in order to know about them, is that of Western Europe. Its example has now spread to other parts of the world. The observation of Islam from Christendom has been going on for many centuries. Though often marred by prejudice and interest, it has nevertheless produced an understanding which is far deeper, knowledge far more extensive and more accurate, than the corresponding and simultaneous observation of Christendom from Islam (Lewis 1993a:7).

Lewis ‘s ideas on Islam in early medieval ages has of two purposes; One was polemical which was designed to refute and destroy its rival faith and other was to know the genuine knowledge about other cultures, their language, its rich history, philosophy and even sciences. For him, Islam never produced an intellectual challenge to the West especially after the middle ages. His notion about early phases of Western discourses on Islam was one way traffic where superiority of western notion was deftly placed. His whole idea locates Islam in history as how Christen West discovered its rival religion who was weak and never challenged superiority of West. He even claims that West lost all interest when they believed that question of conversion (Muslims to Christianity) or seeking any new knowledge from was not helpful for their cause.

For Lewis West has no interest at all in Islam and this region after the middle ages. Anti-Islamic polemic continued in a desultory sort of way in missionary and theological circles but is of no great importance except insofar as it affects and distorts the growth of scholarship in the West (Lewis 1993a). Lewis’s whole

purposes in his works like *Islam in History* was except the theological question Islam was a never an important issue in Western knowledge which was somewhere an attempt by him to places West in more formidable position in its understanding of Islam and the West relationships.

He (1993a) claims that any polemical study on Islam in modern history was only remained exclusive to Soviets for their own reasons to quell the growing nationalist fervor among the Muslims subjects of Soviets. Renaissance is very important period of Orientalist discourse on Islam. Lewis calls this phase in history of Orientalist discourse that succeeded the polemicist of medieval ages. This phase of Orientalism was a reflection of growing rivalry between Europe and Ottoman Empire. The western discourse or mainly European discourse since sixteenth century was influenced by two factors. Lewis finds these two vertical as theological perspectives and practical or strategic perspective to deal with the rising Ottoman Empire (Lewis 1993b; Lewis 2007). The last phase started with Napoleon invasion to Egypt in 1798.

Said observes:

The most interesting problems about Islamic or Arabic Orientalism are, first, the forms taken by the medieval vestiges persisting in it so tenaciously, and, second, the whole history and sociology of connections between it and the societies that produced it. There are strong *affiliations* between Orientalism and, for example, the literary imagination as well as the imperial consciousness. What is striking about many periods of European history is the traffic between what scholars and specialists wrote and what poets, novelists, politicians, and journalists then said about Islam (Said 2003a:344).

Western Imperialism and consolidating European power influenced the nineteenth century western discourses on Islam. This period is most important in establishing Orientalism in western academic discourse. The Napoleon conquest brought new approach by Orientalist to understand their inferior 'others'. This phase is mostly covered as an academic exercise through Saidian notion of Orientalism and his critiques to it which has already been discussed earlier. Bernard Lewis perspective is quintessentially important here as his ideas is important to understand contemporary Western discourse.

Lewis writes:

The charge is often brought, by Orientals against Orientalists, that they are the servants of imperialism and that their work is designed to serve the needs of the administrator, the trader, the diplomat, the agent, and the missionary..... Yet, as an assessment of the motives that impelled Western man, even till now almost alone among mankind, to undertake the study of alien civilizations, this charge is ludicrously inadequate. Empire and commerce may have provided the stimulus and also the opportunity to undertake such studies; they did not, in free societies, direct them. The missionary and the colonial expert have, on the whole, played only a minor part in the development of Islamic

scholarship in the West, and their work, with very few exceptions, has won scant respect and enjoyed little influence among scholars. The major advances were the work of men whose driving force was the desire to know and to understand and whose methods were those of critical scholarship (Lewis 1993a:13).

For Lewis Islam is in between the extremes of collection of bloodthirsty barbarians and sanitized version as a religion of peace (*Foreign Policy*2008). But, Lewis overlooks the complexity of power/knowledge in producing knowledge which has been exclusively promoted and endorsed by imperialists or even corporate interests. Any power can't rule in vacuum and thus requires institution that helps the cause and only through knowledge this can be done. Lewis never bring any concrete challenge which is attached with orientalist who somewhere associated with the power through the agencies of orthodox conception of knowledge and media which serves the power. How Islam has been distorted and misrepresented cannot be dissociated with such notions of Orientalism which is very central to western conception of other civilization especially Islam and Muslim World.

Clash of Civilizations and Perspectives of Bernard Lewis

In September 1990, Bernard Lewis wrote an article for *The Atlantic* with title *The Roots of Muslim Rage* where he first dubbed the differences between Islam and the West as 'clash of civilizations'. Lewis was credited not only to coin this famous term which later Samuel Huntington took it forward first as an article for *Foreign Affairs* and later as a volume.

Lewis formulated his theory as a clash between a rising Christen West against the losing Power, I.e., and an Islamic world. His whole idea had this notion that Islam was reduced to a deprived power after fall of Ottoman Empire against an advanced society as West. There was a growing hatred and hostility in Islamic world after a small period of emulation towards its wealthy and powerful neighbour which once they considered Inferiors. Lewis finds another important reason for this clash was birth of secularism and modernity in the Western world that brought massive changes with success and wealth and that developed fundamentalism among Muslims.

This brought a feeling of deprivation and disappointment (Lewis 1990).For Lewis Muslims had developed this feeling much to their chagrin that their all problems have strong linkages with Western domination, Imperialism and Western Percept. America according to Lewis is 'legitimate heir' of European civilization and later change of events mainly 1979 Iranian Revolution and rise of Khomeini and Salman Rushdie Affair all amalgamated to clash of civilizations between Islam and the West. Lewis propagates this notion of clash of civilizations is real in every sense

and as a vivid resemblance of old rivalry and the universal claims by Christianity and Islam (*Foreign Policy* 2008).

The crux of his hypothesis was this reference where he remarks, “We are facing a mood and a movement far transcending the level of issues and policies and the government that pursue them. This is no less than a clash of civilization- the perhaps irrational but surely historic reaction of an ancient rival against our Judeo-Christian heritage our secularism and world expansion of both”(The Atlantic 1990:60).

Lewis claims of our ‘Judeo-Christen’ against Islam was not only a dishonest remark but it was completely bizarre argument. Considering United States always had strong relationships with Saudi Arabia, Egypt, Pakistan and even Shah’s Iran. Thus any such claims of making it clash between Islam and the West what Lewis did was by drawing a line between Judeo-christen versus Islam will a perfect propaganda to help in producing more hawkish approach which later helped neo-conservatives to cement their position in the United States foreign policies which later proved disaster. Lewis’s remark despite being a historian also falls flat as there is a long history of Christian’s subjugation and persecution of Jews and entire Europe has been plagued with anti-Semitism culminated to holocaust.

There is no such history between Judaism and Islam though largely Islam is closer to Judaism in their monotheist ideas against Christian’s belief of trinity and worshipping Christ. Therefore, despite being a historian he somehow developed a wrong hypothesis of ‘our Judeo-Christen vs Islam’ to distort and misrepresent Islam. It was definitely a prototype Orientalism.

Orientalism and Clash of Perspectives between Edward Said and Bernard Lewis

Edward Said’s critique of Orientalism created an intense debate on how knowledge/power discourse was genuinely placed in Western discourses on Islam in particular. His ideas and methods sparked huge controversy as well as he was accused by many for subverting all the knowledge produced by the West to fix it under the ‘Orientalism’. The perspectives of different intellectuals on Orientalism really changed how West has imagined and constructed the image of Islam. But the responses and accusations between Edward Said and Bernard Lewis went on to personal level as both accused other’s work as polemical abuse. The importance of the schemata between these two intellectuals is profoundly significant and a genuine attempt will be made to critically analyses, how the perspectives of these two intellectuals influenced the method of historicizing and discourses on Islam.

The exchange on Orientalism between Edward Said and Bernard Lewis unleashes a personal reservation about other’s work dubbed with every adjective

of attack. This exchange not only gripped the intellectual class but left a strong footprint that is still followed among various disciplines and even foreign policies in the West.

Edward Said's view on Bernard Lewis

Said questions the prudence of the Orientalist intellectuals for mapping a distort image of other cultures their history and misrepresentations without considering the vagaries of factors and circumstances that comply as a constituent, in a way there is always a choice between genuine scholarship and agenda. In *Orientalism*, he sumptuously defines it as, “profound difference between the will to understand for purposes of co-existence and humanistic enlargement of horizons, and the will to dominate for the purposes of control and external dominion” (Said 2003a:XIV). Said (2001, 2003, 1997) accuses Bernard Lewis as the leader of all Orientalists and a persistent offender of projecting cultural war against Islam. In *Orientalism*, he takes on Lewis on many occasions as an antagonist figure and questions his objectivity and prudence. He inculpated Bernard Lewis and other Orientalists likes of Grunebaum and Gibb for branding Islam as in Ernest Renan’s word as ‘tent and tribe’ and P. M Halt’s word ‘cultural synthesis’ without appraising the constituents such as “economics, sociology, and politics of the Islamic peoples” (Said 2003a: 105).

Said hold Bernard Lewis and his nemesis Orientalists responsible for reducing Palestinian question as ‘return of Islam’. He takes Bernard Lewis’s essay “*Islamic Concepts of Revolution*” and questions his comically persistence and politically motivated in distorting the contextual meaning of *Thawra* and in projecting that right to resist against government’s is an exclusive hallmark of Western values that is absent from Islamic thought. For Lewis such discrepancies lead to ‘defeatism’ and ‘quietism’. He takes this forward and asking his bad sense of history, where Islam must imbibe western notions of nationalism to raise them and as a must for orients to come to the terms with the West(Said 2003a: 314-316).

Said calls Lewis as a ‘Guild of Orientalists’ and remarks that Lewis pronounces “with an extreme level of generalization and with scarcely a mention of the differences between individual Muslims, between Muslim societies, between Muslim traditions and eras. Said call Lewis’s abstraction of calling Muslims are against modernity” (Said 2003a:343). For Said, Lewis’s, “job seems to be to alert Western consumers to the threat of an enraged, congenitally undemocratic and violent Islamic world. Lewis’s verbosity scarcely conceals both the ideological underpinnings of his position and his extraordinary capacity for getting nearly everything wrong”(Said 2003a:343).In Said’ idea, Bernard Lewis’s banal descriptions on Orientalism contextualizing Islam and the Arab world are anything but scientific. For Said,

Lewis's opposition to Orientalism is not just limited to bogus and polemical abuse but veneer beneath his political propositions and ideological one-upmanship than true intellectual differences. In Said's view Lewis's attempt of distorting images of Islam is just an extension of massive polemical set up against Islam in the Middle Ages.

For Said, "there is a remarkable (but nonetheless intelligible) coincidence between the rise of modern Orientalist scholarship and the acquisition of vast Eastern empires by Britain and France" (Said 1982:2). Bernard Lewis propagates his theory that European discovery of Islam is just quest for knowledge and nothing else. Said responds to him and finds such argument highly political in nature. He calls Lewis's notion of Western civilization's exclusive pursuit for knowledge about other culture is not the yardstick for true knowledge. Said writes, "Lewis's arguments are presented as emanating exclusively from the scholar's apolitical impartiality, whereas he has become a widely rated authority for anti-Islamic, anti-Arab, Zionist, and Cold War crusades, all of them underwritten by a zealotry covered with a veneer of urbanity that has very little in common with the 'science' and learning Lewis purports to be upholding" (Said 2000a:205).

Edward Said's view on Clash of Civilizations is quite noteworthy. He calls it a true imagination of Bernard Lewis's conception that came in 1990 in *Atlantic* which later used exhaustively by Samuel Huntington. Said finds such hypothesis as untrue and not neutral and calls Huntington polemics as 'crisis manager and not as a student of civilization'. For Said, World of Huntington and Lewis is to visualize how west triumphs against other civilizations and outdo them especially Islam.

He remarks:

Like Lewis, Huntington defines Islamic civilization reductively, as if what matters most about it is its supposed anti-Westernism. For his part Lewis tries to give a set of reasons for his definition—that Islam has never modernized, that it never separated between Church and State, that it has been incapable of understanding other civilizations—but Huntington does not bother with them. For him Islam, Confucianism, and the other five or six civilizations (Hindu, Japanese, Slavic-Orthodox, Latin American, and African) that still exist are separate from one another, and consequently potentially in a conflict which he wants to manage, not resolve (Said 2000a: 573; Said 2003c:71).

For Said the diatribes against Orientalism and particularly Arab Orientalism by Bernard Lewis gives an impression that his whole purpose of projecting himself as a defender of his academic curiosity the field he belongs is just to cover up his conscious effort to demean Arab cause at the highest platforms. That implies, he misleads non specialists as he is practicing politics by harboring that he is offering scholarship.

Said finds that he never attempted to write a biography of Orientalist history and omission of German Orientalism is simply because of that and his purpose was not to document every account of orientalist history but particularly using British and French Orientalism for the linkages with the region and its vast imperialist history. Therefore, any such malicious attempt for reducing his intellectual practice by smear campaign or referring his ethnic genealogy by Orientalist are nothing but simply it mirrors what he wrote in *Orientalism*. He responds Bernard Lewis in their exchange on Orientalism carried in *New York Review (NYR of Books)* 1982). He writes, “Insouciant, outrageous, arbitrary, false, absurd, astonishing, reckless—these are some of the words Bernard Lewis [NYR, June 24] uses to characterize what he interprets me as saying in *Orientalism* (1978). Yet despite these protestations, the sheer length of his diatribe and the four years of gestation he needed to produce it suggest that he takes what I say quite seriously, non-Orientalist though I may be” (Said 1982).

An Exchange of Orientalism: Bernard Lewis’s response to Edward Said

In *Orientalism* Edward Said accused Lewis’s scholarship as polemical abuse and called him a politician in the garb of an academician. A historian who has deliberated distorted the Islamic history and one who is real founder of war of world project through his nemesis Samuel Huntington in *Clash of Civilizations*. Bernard Lewis’s response and his engagement with Said through the exchange on Orientalism can be dubbed as war of two intellectuals of their respected fields. Lewis lived through with this image that he always had deep influence on US foreign policy makers and it is known history that he along with Fouad Ajami is the real brain behind US attack On Iraq.

The limitation of this study on Lewis response to Said will only cover his direct response to Said through his commentaries on Orientalism and responses to personal accusations hurled at him by Edward Said. Lewis termed Said’s *Orientalism* as an ‘intellectual pollution without salvation’ (Lewis 1982b) and Said as an ignorant academician who doesn’t know enough history of the Arab world. He (1993b) question’s Said analogy on British and French Orientalism to suit their imperialist agenda and why he doesn’t count Persians and Turkish history and surprise exclusion of German Orientalism.

He remarks:

The dimensions of Orientalism in time and space are similarly restricted. To prove his thesis, Mr. Said rearranges both the geography and the history of Orientalism and, in particular, places the main development of Arabic studies in Britain and France and dates them after the British and French expansion in the Arab world. In fact, these stud-

ies were well established in Britain and France long before even the erroneously early date that he assigns to British and French expansion—and at no time before or after the imperial age did their contribution, in range, depth, or standard, match the achievement of the great centres of Oriental studies in Germany and neighbouring countries. Indeed, any history or theory of Arabic studies in Europe without the Germans makes as much sense as would a history or theory of European music or philosophy with the same omission (Lewis 1993b:108).

Lewis accuses Said for distorting all scholarships collected in the west on orient world under the tone of ‘expansionist agenda’ is nothing but a bad sense of history. For Lewis Said, “reveals a disquieting lack of knowledge of what scholars do and what scholarship is about” (Lewis 1982b).

Lewis rubbishes Said’s critique on Orientalism and called anti-Orientalism doesn’t display of creating a binary between how West has deceived East on resources rather it is an epistemological question dealing with the scientific methods and how knowledge is produced. For Lewis, Said overlooks the facts and validates his own notions of history without checking the factual merit to it. Lewis responded that Said critique of Orientalism left him mystified and question his honesty on misrepresenting history on creating a false notions about Capture of Muslim armies of before North Africa (Lewis 1993b:109).

Though Lewis questions Said on the accusation of creating a distorted image of Islam and the Arab world in general and largely due to this notion of superior west on inferior East especially Islam. Lewis calls this everything but a genuine description. He draws parallel between British imperialism in India and try to prove his point by calling that British never ruled in the Islamic World in the equal depth , extent and never had such enduring effect but there is no such accusation on its rule in India compare to what Said claims on Arab world.

But Lewis didn’t prove his point well. India and British or the West never had a period of shared or civilizational proximity. Also West or Europe never had a religious war with India unlike Islamic world which had an enduring history of war since the advent of Islam and crusade is testimony to such differences. Lewis also fails here in understanding that British imperialism on India was limited to economic loot and never ever there was a long history of religious war unlike in the Arab World. Lewis response to Said’s accusation on Knowledge is Power and it linkages with Western domination in the larger Oriental world where Said finds this linkage strongly place in western discourses mainly its relationship with Islam and Arab world. Lewis doesn’t disapprove the allegations as mere polemic or question its authenticity but he doesn’t consider the accusation of targeting entire Orientalist enterprise to involve in such expeditions.

He finds:

No doubt there were some Orientalists who, objectively or subjectively, served or profited from imperial domination. But as an explanation of the Orientalist enterprise as a whole, it is absurdly inadequate. If the pursuit of power through knowledge is the only or even the prime motive, why did the study of Arabic and Islam begin in Europe centuries before the Muslim conquerors were driven from eastern and western European soil and the Europeans embarked on their counterattack? Why did these studies flourish in European countries that never had any share in the domination of the Arab world and yet made a contribution as great as the English and French—most scholars would say greater? And why did Western scholars devote so much effort to the decipherment and recovery of the monuments of ancient Middle Eastern civilization, long since forgotten in their own countries?(Lewis1993b:117-118).

Lewis debunks Said's allegations on his association with congressional committee or such political affiliations as a smear campaign or personal abuse against him. He accuses Said of making it a personal issue by politicizing the genuine scholarships after failing to define Orientalism as a genuine scholarly sense rather a propaganda and polemical abuse. He writes, "It is difficult to argue with a scream of rage. Apparently unwilling to defend his interpretation of Orientalism—a branch of scholarship—on a scholarly level, Mr. Said insists on politicizing the whole question and assigning a political significance not only to his own statements but also to those of any who have the temerity to question his facts and methods (Lewis 1982a:12).

Bernard Lewis's response to Edward Said and the controversies on Orientalism created an intense debate through multiple academic exchanges. Lewis calls it, "I answer these 'accusations', it is not because I believe that such actions, if authentic, would be crimes, or even that, if crimes, they would in any way be relevant to the discussion of Mr. Said's scholarship. They may however serve to illustrate Mr. Said's way with facts and documents" (Lewis 1982a). His book *Islam And the West* and his open exchange on Orientalism with Said carried by *New York Review of Books* in 1982 drew many reviews and different responses. There were huge body of work followed their exchange on Orientalism.

Lewis in his biography that came in 2013 under the name *Notes on A Century: Reflection of A Middle East Historian* revives his exchanges with Said on Orientalism. Edward Said will be recalled for creating a discourse of Orientalism that really changed how one sees something in the way one looks at it and what one perceives without associating with some preconceived notions. The next chapter will map the detail works on both Edward Said and Bernard Lewis, their criticism and praise and how the responses on their works and their scholarly exchanges that left strong impression on Western discourses on Islam will be critically examined.

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Look East Policy: The implications for North East India

H. Vanlallawta

India and Association of Southeast Asian Nations (ASEAN) countries were not in cordial relations during the Cold War period due to wide divergence of perspectives in the fields of politics and economic policies. However, after India changed the economic policy and redefined its foreign policy (for instance, Look East Policy in 1991), the relationship of India and ASEAN countries have been gradually improving. The motives of Look East Policy were broadly planned to catch up with the economic and security-oriented long term national interest of India. As a matter of fact, the key purpose of the Look East Policy is to contain the growing power of China in Southeast Asia, particularly in Myanmar and to make engagements with the Southeast Asian countries. Thus, this article mainly tries to focus on the origin and objectives of the Look East Policy of India through a discussion on India and ASEAN relations during the cold war as well as post-cold war period and how it has impacted on the development of the North Eastern Region of India.

Introduction

Look East Policy was adopted in 1991 during the period of the coalition government under the Prime Ministership of P.V. Narasimha Rao. It was one of the important initiatives in the foreign policy of India after the end of Cold War. In general, the aim of such an initiative was to effectively link with ASEAN countries in the field of economy and security. In fact, "India's Look East Policy can be described as a search for political and economic convergence with the East and Southeast Asia as well as Pacific region by fully exploiting the new opportunities with a pragmatic approach towards regional integration aimed at serving India's long term national interest"(Gogoi 2010:38). One of the prominent assumptions behind India moving to ASEAN is that, ASEAN countries are strategically important for India in the realm of its long term economic and security purposes. This chapter is organized in the following manner. The first part of the chapter discusses the evolution of India's Look East Policy; the second part of the chapter discusses China as a factor in Look East Policy while the third part discusses India's North East and its linkages with Look East Policy of India.

Evolution of Look East Policy

India did not pay much attention towards the Southeast Asian region during the Cold War period, possibly due to being too pre-occupied with Pakistan and other neighbours such as China. Meanwhile, even during this period, India still had bilateral relations with some ASEAN countries such as Malaysia, Singapore, and Indonesia and so on. However, other than Malaysia, the relations of India and the other two countries were patchy. This clearly shows that India was not very serious to build relations with ASEAN countries. Thingnam Kisan Singh, an expert on North-East Studies, opined that “India never really made serious efforts look to eastward. On the other hand, it maintained a marked distance from the Southeast Asian region” (Singh 2009:1). The Look East Policy of 1991 reflects a significant change in India’s attitude toward the Southeast Asian nations and it is also considered to be a turning point in India and ASEAN relations.

The origin of the policy can be traced into the domestic politics of India and the changes in the international politics. In 1991 in the wake of Rajiv Gandhi’s assassination, post of the Prime Minister was handed over to Narasimha Rao and this led to revise of the domestic economic policy of India. Prior to 1991, India had a broader mixed economy, where private sector and public sector were reconciled with each other. Such an economic policy seemed to be a failure as India met with serious financial crisis (Balance of Payment crises and so on). By the end of 1990’s, the financial problem of India’s reached its climax. Therefore, when, Narasimha Rao became the Prime Minister of India, the national leadership of that time considered that it was necessary to change the policy of India and were looking for alternative policies to solve the domestic financial issue. Therefore, India adopted Liberalization, Privatization and Globalization in the realm of the domestic economic policy while on the other hand the Look East Policy was adopted in its foreign policy to reconcile with the domestic policy. Rajan (2007) an expert of India’s Look East Policy argued that “India’s Look East Policy, under implementation since early 1990s has been in response to the initiation of economic reforms and liberalization within the country.....”

Like the domestic factors, international politics also played an important role in India adopting Look East Policy. For instance, in 1991, Russia disintegrated due to economic failures; as a result it led to the end of the Cold war. Consequently, such a collapse of international order due to the disintegration of Soviet Union changed the international politics. Thus, the end of cold war brought a new era and changes in the international politics, which focuses on the economic content of relations instead of the earlier security purposes- oriented alliances. This has led to the development of the establishment of regional economic organization. (Hoakip 2011:1). During the Cold War period, the world was divided into two camps under

the leadership of US and USSR and there were too many frictions between the two camps. Every ASEAN country was in alliance with either of the bloc; therefore, the Southeast Asian region was also turned into a site of rivalry between US and USSR. Hence, there was no chance to involve other countries from neighboring regions. After the end of the cold war, the two power blocs withdrew military bases from ASEAN countries. For instance Soviet troop's withdrawal from Cam Rahn Bay and Da Nang in Vietnam and the US military bases from Subic Bay in the Philippines in 1992 are the cases in point (Grare & Mattoo 2001:198). The withdrawal of the two power blocs made power vacuum in the region and this led to the opening a chance to involve other countries from the neighboring region of Southeast Asia. Therefore, India and China, the regional powers in Asia, immediately tried to interfere in the region. As a matter of fact, China had engagements with Myanmar just before the culmination of Cold war. China had deep rooted relations with Southeast Asian countries, particularly in Myanmar, the neighbouring country of India. This, in a way, has generated security concerns for India. Therefore, the security apprehension of India from China is one of the factors of India adopting Look East Policy. In addition, the end of the cold war also brought the previous cold war image of ASEAN and India's affiliations to different political camps in the global bipolar system got transformed(Naidu 2004:336). As a result, India and ASEAN could have wide consensus and gradually built up their relations.

China as a factor of India's Look East Policy

China and India have not been in good terms since they attained independence due to the disputes prevailing between them. The two countries had also fought war in 1962 due to border disputes. Despite a significant changes that got manifested in Sino-Indian relationships, both countries have still mutual distrust and suspicion, Chinese considers that India is likely to be an opponent in regional conflicts(Malik 1994: 143).India has also been suspicious due to the different policies of China; for instance, China tried to influence Indian neighbours and interfere in the Indian Ocean. Therefore, the tug of war has been going on and friction due to border issue also sporadically happens. After China tried to improve relations with India's neighbours particularly Myanmar, India has been more concerned about the security. Therefore, India adopted Look East Policy to contain the growing power of China in Southeast Asian countries, particularly in Myanmar. The India's threat perception of the growing power/influence of China resulted in India playing a major in BIMSTEC, Mekong-Ganga Cooperation (MGC) and Bangladesh-China-India-Myanmar Regional Economic Forum (BCIM). BIMSTEC and MGC have been growing gradually as there is no friction among the member countries but Bangladesh-China-India-Myanmar Regional Economic Forum (BCIM Forum)

is yet to attain momentum. It appears that due to China included at the forum therefore India does not want to pay heed (Haokip 2008:3). As a result, the forum is also not vibrant and it is like a dead forum.

Meanwhile, the ASEAN countries also wanted India's intervention in their region to neutralize possible threat from China. Therefore, they offered India to be affiliated to ASEAN Regional Forum (ARF) because many of the ASEAN nations have territorial disputes with China particularly over Spratleys Island in South China Sea. In addition, ASEAN nation's threat perception on China indicates that they have accepted Myanmar as their member country and this was done in order to protect Myanmar from the influence of China (Batabayl 2006:181-185).

Another important contentious rivalry between the two countries is on the Indian Ocean issue. Indian Ocean is very important for both India and China. In case of India, it is significant for the reason of supreme national security interest of survival (Khurana 2009:2). Therefore, it is pre-occupied by India "but from the Chinese viewpoint, India considers itself to be a natural successor of the great British Empire and wants to include within its sphere of influence the Indian Ocean, the erstwhile British lake". Many senior Chinese leaders have the opinion that India is not the sole possessor of Indian Ocean (Khurana 2008:5). Of course, Indian Ocean is very significant for China as well because like many other countries China is not self-sufficient in oil and it depends on import from the Middle East and Africa coming through the Indian Ocean. In addition, Indian Ocean is very advantageous for China to export articles manufactured in southern China through the Myanmar side which would considerably cut down transportation costs. Apart from this, the crossing of South China Sea and Malacca Strait are not secured for China as they have Sprately Island dispute with the surrounding countries in case of a military conflict. Therefore, China has to search alternative directions to import oil in case of a blockade of the route of Malacca Strait and South China Sea. Thus, Myanmar-Yunnan route via Indian Ocean is the best option for China 'until Central Asia's political developments remain hazardous and the region has not been made secure' (Egreteau 2003:175-176). For this purpose, China immensely needs to please the Myanmar leaders and provides military and financial aid. In addition, China constructed Myanmar port in return for Myanmar to allow the use of the facility by the Chinese army. This is the main concern for India, particularly since 1992. The concern emanates from the fact that China interfered in setting up of sophisticated weapons on the Greater Coco Island of Myanmar, just a few distance away in terms of nautical Miles from the Andaman Island of India (Egreteau 2008:40). If so, China will be able to oversee the movement of the Indian navy in the Indian Ocean and all the strategic places of India such as Indian Space Research Organization (ISRO) at Sriharikota in Andhra Pradesh and the Defense Research

Development at Chandipur on Sea in Orissa (Lintner 2012:269). Thus, the gradual Chinese influence in the neighbouring countries of India is a great threat for the security of India from an Indian point of view. Therefore, India also interferes in the South China Sea, the disputed Island between China and some ASEAN countries in retaliation of the Chinese intervention in the neighboring countries of India. This is reinforced through the statement by C Rajamohan that “India’s planned move to gain access to the South China Sea is primarily a response to what has been assessed as China’s strategy of encircling India” (Batabyal 2006:185). It is in this context that India adopted Look East Policy and to understand its further significance, it is important to highlight the historical linkages of India and ASEAN countries during the Cold War Period.

India and ASEAN Relation during Cold War Era

After India attained independence, the leaders of India adopted non-alignment policy in foreign policy discourses in view of the situation prevailing in international politics at that point of time. During this period the Cold war atmosphere covered the whole of international politics, which undermined even the international peace and security. As a newly emerging country, India had tried to remain outside the alliance system and wanted to unite Asian countries in order to have world peace and long term interest of the third world countries (Gogoi 2010:35). Meanwhile, the SE Asian countries wanted the Western powers to be involved in the region in order to contain the influence of Communism in the areas of their influence. Thus, such ideological differences began to determine the relationships of India and SE countries during the whole of Cold war period.

The ideological divergence appeared for the first time between India and Southeast Asian leaders at the Afro-Asian conference held in Bandung, Indonesia in 1955. During this conference, the Philippines leader Romulo openly criticized the policy of neutrality saying that it helped the Communism; but Nehru denounced the military organization like the SEATO. Furthermore, the Indian leaders considered that SEATO as a tool of US to interfere in the internal affairs of Asian countries. In addition, Nehru and Sukarno, the leader of Indonesia had also clashed their opinion on the threat to world peace at the Bandung conference. As a result of their discrepancy of the political views of India and some ASEAN leaders, it created a gap among them. The shadow of the relations of India and Southeast Asian countries unearthed openly during the Sino-Indian war broke out in 1962 and Indo-Pakistan war in 1965. During this war, only Malaysia supported India from the part of the Southeast Asian countries. This clearly showed the image of the relations among India and SE Asian countries. As a matter of fact, India was the only country outside SE Asian bloc invited to become a member of ASEAN but India declined their offer.

The reason might be due to the fact that the ASEAN countries were in alliance with Western countries and therefore, India might want to avoid those alliances involving countries from the West. The decline of the invitation to be a member of ASEAN by India was a great mistake for India to build up relationships with the ASEAN countries (Grare and Mattoo 2001:46-55).

In 1970, India gradually moved closer to Soviet Union due to Bangladesh liberation movement and this movement compelled India to enter in alliance with the Soviet Union. Therefore, India and Soviet Union signed the treaty for peace, friendship and cooperation in 1971 (Hong 2006:145). As a result of the treaty with Soviet Union, the relationships of India and ASEAN countries were far worse than earlier because most of the ASEAN countries were anti-communist countries. During the period of Janata Government in 1977, the government of India attempted to improve relations with ASEAN countries but unfortunately there was a new issue which emerged to spoil their relations. In 1978, Vietnamese invaded the Kampuchea. The ASEAN countries condemned the Vietnamese and overthrow the Pol Pot regime and setting up of Heng Samrin administration in Phnom Penh. But India had a conflict notion of the ASEAN countries and raised the voice in favour of Heng Samrin. Indian media condemned the policy of the then government of India towards ASEAN countries. The Economic Times, one of the leading daily newspapers of India brazenly expressed the opinion on the issue and accused the Indian government for the lack of imagination (the Daily analyzed the economic benefit emerging out of prospective India-ASEAN ties). Apart from this, India silently supported the USSR invasion of Afghanistan and later they recognized the Vietnamese backed Heng Samrin regime which further soured its relations with the ASEAN countries. Therefore, the ASEAN countries were very unhappy with India on many of the policy decisions India took at the international level. Their disappointments were also clearly expressed against India and they also signaled that it was impossible to reconcile Vietnamese and Kampuchians with ASEAN countries (Grare & Mattoo 2001:57-58). Thus, the above mentioned development clearly indicates that India and ASEAN relations during the cold war period were strained and friction-ridden in the entire period. The main problem of both the parties was that they had ideological conflicts which in turn led to suspicion. Some of the ASEAN countries considered that India is an ally of Soviet Union and most of the ASEAN countries were anti-communist; on the other hand, India believed that the ASEAN countries were strong supporters of the west. As a result of such a suspicion, it was difficult to build cordial relations among India and ASEAN countries.

Apart from the politically diverging views of the two sides, they had discrepancy in the realm of economic policies. Most of the SE Asian countries like Singapore

followed a high intensity export and growth oriented economies while India followed self-reliant centric policies and import substitution models (Das 2007). Despite all these differences, India made efforts to make cordial relations with the ASEAN countries; but it was in vain and could not produce any desired results. Instead of India, they wanted to develop their economic relations with East Asian countries such as Japan and Korea. (Rao 2012:94). Only after India changed the economic policy and took the initiative of the Look East Policy in 1991, India and ASEAN countries improved their ties. At the initial stage of the Look East Policy, it (India) focused on ASEAN region and primarily on trade and investment (as a priority area) (Hoakip 2011:2). After gradually improving the relations between India and ASEAN, India became a Sectoral Dialogue partner of ASEAN in March 1993 and the first dialogue took place in Bali in early 1994. Based on this meeting, India became a partner with ASEAN in the field of trade, investment and tourism (Ghoshal 1996:106). India became a Full Dialogue partner in 1995, member of the ASEAN Regional Forum (ARF) in July 1996 and finally to the Summit Partnership in 2002. The second phase was started in 2003 which is more comprehensive in its coverage, extending from Australia to East Asia with ASEAN as its core. The new phase cover a wide range of different fields like economic, security, political and physical connectivity through road and rail links(Hoakip 2011:2)

North East India and Look East Policy

As mentioned above, the first phase of the Look East Policy mainly focused on bilateral trade and investment, the second phase included the development of the North East India. North East India consisting of contiguous seven sisters-Arunachal Pradesh, Assam, Mizoram, Meghalaya, Nagaland, Manipur and Tripura. The region of North East India is often referred to as the land of diversity. The region is a unique place and a meeting ground of many civilizations. Almost all the states of North East share ethnic ties with the surrounding neighbouring countries particularly Burma and China (Gogoi 2010:1). The cultural relationships of India's North East ethnic groups with the Southeast Asian groups which have remained completely untapped so far also brings new opportunities in the current context of the Look East Policy. Most of the ethnic groups of North East are not Indo-Aryan by origin, but primarily consist of peoples of Mongoloid origin who have migrated to the region centuries ago from Mongolia, Tibet, China, Thailand and Burma and other SE Asian countries (Gogoi 2010:46). Therefore, India is, currently, trying to utilize the cultural linkages between North East India and Southeast Asia. Sanjib Baruah, the expert of Look East Policy also mentioned that "India should take more advantage of the Northeast India's history and culture as a soft power resource. This involves reviving the shared historical and cultural ties between the people of Northeast India and Southeast Asia" (Hoakip 2010:7)

During the British period the NE India had access to other regions of the world through Chittagong port. With the partition, the North East region became landlocked and cut off from the traditional gateway to the West and Eastern part. Presently, the region of NE shares India's international borders with Bangladesh, Myanmar, China, Bhutan and Nepal. The entire area is connected with the Indian mainland by 22 km land corridor through Siliguri in the state of West Bengal popularly known as chicken neck (Gogoi 2010:2-3). As mentioned earlier, the partition created a lot of problems for the NE India and kept it land locked. As a result, the NE India suffers from developmental challenges. According to B.G Verghese the partition of India in 1947 has 'caused the extreme isolation of the NE India' (Gogoi 2010:44). The political map of North East India transformed significantly in the post-colonial period and this made the problem of North East India a more complicated one. For instance many of the ethnic groups got separated under different administrative units and began to fight for uniting under the umbrella of autonomy and some fought for secessionism from Indian Union. Thus, the change of the political map and spreading of the similar ethnics in different regions are one of the reasons that caused the militancy in the North Eastern region. Apart from these, geographical landscape of the region created communication barriers with other parts of India. Such issues resulted in the backwardness of the region.

Thus, keeping in mind the root cause of the problems of NE India, the government of India took many initiatives on bilateral and multilateral projects for boosting connectivity between Southeast Asia and North East India. Some important projects are Moreh-Tamu-Kalewa Road, India-Myanmar-Thailand trilateral Highway, Trans Asian Highway, India Myanmar Rail linkages, Kaladan Multi-modal Project, the Stillwell road, Tamanthi Hydro electricity project and optical fiber network (Mazumdar 2010:2). Thus, the above mentioned projects are under various levels of implementation and which are considered to have generated a huge positive impact on the NE region. Apart from these, the government of India tried to open as much border trade as possible between North East India and Myanmar to enhance connectivity and development of NE India. In essence, border trade is one of the important objectives of the Look East Policy of India. In the above mentioned discussion, the situation of the border trade between NE India and Myanmar are discussed in the following.

Border trade

Border trade is an integral part of the Look East Policy; therefore, the two countries India and Myanmar signed border trade agreement on January 21 1994. According to this agreement, the two countries allowed opening Land Custom

Station in two places in Northeast India- Moreh (Manipur) in India Tamu in Myanmar, Zokhawthar (Mizoram) in India and Rih in Myanmar and they also signed MoUs to open other places by mutual agreement between the two countries (Hoakip 2011:5). Land Custom Station is the place for exchange of goods and access of the people of the border areas of both the countries. The border trade in Moreh and Tamu were inaugurated in the year in 1995 after they have reached the agreement. Zokhawthar was inaugurated in 2015 by Nirmala Sitharam, the Trade and Commerce Minister. Thus, both the two border trade sites are now formally functioning in these two areas. The government of India also tries to set up in other states like Nagaland and Arunachal Pradesh but it is not exactly known when they will inaugurate and formally function. Presently, there are 38 notified Land Custom station in NE India but in regard to NE and Myanmar only 4 LSC are available; among these, only two custom stations are normally functional such as Moreh in Manipur and Mizoram, according to the source of Ministry of Development of North Eastern region (India, Ministry of Development North Eastern Region (DoNER) 2011).

At the beginning, there are 22 items which are traded items at these border trade and such items are mostly agricultural products i.e. Bamboo, Betal nuts and leaves, Chilies, Coriander seeds, Food items for local consumption, Fresh vegetables, fruits, Garlic, ginger, Katha, Minor forest products, Mustard, rape seed, onion etc. According to the Gazette Ministry of Commerce and Industry under public notice 106 (RE 2008)/2004-2009 dated 7 November 2008, they added another 18 items for trade-able items. Such items are agarbatti, bicycle's spare parts, blades bulbs, cosmetics, cotton fabrics, fertilizers, imitation jewelry, insecticides, leather footwear, lifesaving drugs, menthol, mosquito coils, paints and varnished etc. Again in November 2012, they added another 22 items and now it has become 62 trade-able items in the border trade between India and Myanmar (India, Ministry of Commerce and Industry 2014).

According to border trade agreement, there are three types of trade systems between India and Myanmar border such as traditional exchange system, barter trade and normal Trade. According to the first system, it is possible to exchange local product up to 1000 US dollars between the people of both side of the border area under simplified documentation without GR formalities, on payment of customs duty*¹. The next system is Barter trade*². In this system, it is allowed 22 items up to 20000 US dollar with formalities as per DGFT PN No. 289 (PN 92-97 and on payment of customs duty. Under this system traders should possess IEC allotted by Director General of Foreign Trade.(Das, Singh & Thomas 2005:64). But this system of Barter trade had abolished by the Reserve Bank of India in 2015(News Report, www.economic times). The third one is Normal Trade*³. As

per this system, transaction of the trade should be through banking channels for all freely permissible items of exports and imports and with licenses for restricted items as per foreign Trade Policy guidelines (Das et al 2005:64).

As mentioned above, the trade items are mostly the daily basic needs and agricultural products between the border areas. There are no costly trade items to rise up the trade volume. Even in the case of agricultural products, both the parties produced each other's and no parties to export and import each other except a few items. The trading system is also complicated for the backward and remote regions. Many of the traders involved between the two border areas are uneducated and it is difficult for them to comprehend those complicated trading procedure. Perhaps, as a result of the trade items and trading system, the trade volume of the border trade cannot be stable and booming.

Opportunities of Look East Policy for North East India

Northeast India has a huge potential but the geographical factor is the main problem for the development in the region. As many places of the North East are hilly rough mountains therefore, it is difficult to construct road and rail route in the region. Thus, there is very low density of road and rail route in the North East India as compared to other parts of India particularly railway communication. Some states have below zero percent in the region. Therefore, development cannot take place in the region like other parts of India. Channelizing is the main important factor for the development of any place. Therefore, Government of India keeps priority to provide better communication to North East people. As a matter of fact, the geographical location of North East India is strategically important as a bridging point since it is located as the linkage of the ASEAN, South Asia and Far East Asia. Therefore, the Northeast India can function as the gateway of India in the Southeast and Eastern Asia. Rajiv Pratap also mentioned that "Mumbai is also the financial capital of India due to the gateway of India in the western sector; hence it automatically became the financial capital of India. If the geo-political and geo-economic problems of North-eastern region ends, the region too can become the connecting hub between the three huge and fast developing markets the ASEAN, South Asia and Far East Asia" (Lyngdoh and Rani 2008:36).

One of the problems of North East India is militancy in the region. There is a perception that militancy is one of the factors that make the region remain underdeveloped as compared to other parts of India. The Militant groups in NE India are based on ethnic line and they have base mostly in Myanmar side and have committed crimes in North East India. As mentioned above, the Look East Policy is adopted due to the main concern of security purpose. Therefore, to tackle the insurgency in the North-East region is also one of the main concerns of India. An

“analyst have suggested that once the separatist insurgencies are controlled, Indian companies can start setting up large scale manufacturing units in West Bengal and North East states, taking advantage of the favorable investments concessions announced for export units by Delhi”(Thomas 2006:31). Currently industrial backwardness is the problem of North East India. Thus, if the environment is suitable to set up industry, it will be a good upliftment of North East economy and also to solve the problem of unemployment problem.

The extremist groups in the North East have different objectives based on their organization. Some extremist groups are set up just to protect their ethnic interest and do not have secessionist mind set from India. Even some youths are considered to join extremist groups due to lack of job opportunities. They join militant groups and used to collect huge money from the traders and businessmen and use it to feed their family. As a result, it creates unfavourable atmosphere for the investment in North East India. Consequently, development cannot be moved smoothly in the region due to unfavorable atmosphere owing to insurgency. Thus, if the Look East Policy provides wider job opportunities, it will mitigate many problems of the insurgency and alsodevelopment can move faster in the region (Researcher’s interviews with officials).

The region of NE India has a huge potential of hydro-electric power but it is untapped resources due to lack of infrastructure. More than two-thirds of India’s total hydropower potential (84000MW) exists in the region but it has developed only 253 MW which is about 0.8 percent of the total available potential (Das et al. 2005:112). Similarly, tourism is a powerful apparatus of economic development of a country. Even the international level tourism contributes a huge amount of GDP growth (10.6%in 2005) and generates employment around 221.568 million in 2005 (Lyngdoh & Rani 2008:104). NE India has also a good opportunity to promote tourism in the field of rural tourism, heritage tourism, and medical and health tourism and so on. Sikkim has also successfully promoted tourism. Now tourism is one of the main important economies of their state. So, the LEP policy will provide better opportunities to promote tourism in the region if they can bridge with the Southeast Asian and East Asian countries.

After the full-fledged implementation of the LEP, it is assumed that the region will have good communication therefore; it will widely open development of entrepreneurial among the local people of the region which in turn will create a favorable environment for the establishment of hotels, restaurants and dhabas along the routes (Lyngdoh & Rani 2008:45).This is one of the important factors to generate employment among the local people. In addition, it will also open to set up forest and agro-based industry for the local people. Currently, NE India has potential in agriculture, horticulture, floriculture, sericulture industry but due to

lack of inadequate and limited public and private investment (Das et al. 2005:139). Hence, it is not possible to develop as it is.

As mentioned earlier, the root causes of the problem of NE region is geographical location and lack of communication. The regions of NE India have poor communication as compared to the mainland India particularly the railway.

State	BG	MG	Total Km
Arunachal Pradesh		1.26	1.26
Assam	1443.03	990.96	2433.99
Tripura	0	151.40	151.40
Nagaland	11.13	1.72	12.85
Manipur	-	1.35	1.35
Mizoram	-	1.50	1.50
Meghalaya	-	-	-
Sikkim	-	-	-
Total	1454	1149.19	2602.35

Source: (Ministry of Development of North Eastern Region (DoNER) 2011)

As a result of means of poor railway communication, the regions import the goods from Assam mostly by roads. Consequently, as the cost of transportation charge is high, goods are highly priced and are sold at more than the maximum retail price by the traders in the region. Therefore, the government of India has taken many initiatives/projects for the development of communication. Presently, only a few states are connected by railway line in the North East region. Thus, the government of India plans to construct railway lines to connect every North East capital. Now some projects are under implementation. Even a few years back, Prime Minister Modi inaugurated the railway line between Assam and Meghalaya. In addition, it is constructing the Bairabi-Sairang broad gauge rail link in Mizoram. Bairabi is the Mizoram-Assam border town and it is the only rail linking of Mizoram with the rest of the country. This construction is expected to finish by 2018 (News Report, [www.economic times.com](http://www.economic-times.com)). In the case of air connectivity, Guwahati airport in Assam is the only international airport in NE Region. In 2013, Agartala airport in Tripura and Imphal airport were notified to be international airport. This is a part of the Look East Policy to boost the North East region's connectivity and trade with Southeast Asia. In addition, the Kaladan Multi Modal Transit Transport provides access to South East Asia on both inland and water through Aizawl to Sittwe port in Myanmar via Lawngtlai, Zorinpui, Kaletwe and Paletwe. This route will cut short the distance between the Mainland India to the North East (Mizoram, Ministry of trade and commerce department (MTC) 2011). The current route distance between Haldia port, Kolkata and Lawngtlai in Mizoram

via Siliguri is 1880 Kms. But it only 930 Kms between Lawngtlai and Kolkata port through the Kaladan Multi Modal road via Sittew port.(Halliday, 2014) It means that, half of the distance is shortened by the Kaladan Multi Modal route. Thus, the North East India, particularly Mizoram, has high expectation of this route and they are eagerly waiting to inaugurate the route as well and it is considered to bring good opportunities for the people of the North East as their high hope of it is full implementation of this project.

Above all these, the Look East Policy also able to provides job opportunity to the youths of the NE India not only in the local areas but also abroad in Southeast and East Asian countries. Even currently, some youths of NE India are employed in different job in different parts of Southeast Asia and East Asian countries. Recently, the Japanese government has called for 15000 nurses to be sent from Manipur to Japan (News Report. www.thenortheasttoday.com). This is a sign of job opportunity available for the NE youths in ASEAN and East Asian countries. Well, sending the local youths of the NE India to abroad for working is a good idea to solve unemployment problem in the region. Not only that, it will increase economic situation of the NE India and provide better standard of living. Apart from this, it is possible to create opportunity for the NE youths to join the advance technical institution of the Southeast Asia and East Asian countries.

Challenges to the Look East Policy

One of the important challenges is militancy and extortion in the region of North East. The militant groups are mostly dependent on collecting money from the local people and traders who passed through the roads in their area. Sometimes, some militant groups kidnapped either the local people or the company workers and demand huge ransom money from their families. According to the news report of Assam tribune, daily newspaper of Assam, in the year of 1999-2011, around 69 persons were kidnapped in Mizoram. Such militant groups involve in kidnapping are Hmar People Conference (D), Bru National Liberation Front and ZRA. Other militant groups such as NSCN (Khaplang), NSCN (IM), ULFA, PLA etc are involved in extortion and terrorist activities in their operational areas. As a result of the activities of the militant groups, the North East image led to tarnish and less attractive for the investors. Therefore, the investors hesitate to come and invest in the North East. Former Minister Jai Ram Ramesh pointed out that ‘Look East Policy will not be meaningful if we only keep looking’. Look east is for a purpose, to invest and generate revenue from the east’ (Lyngdoh & Rani 2008: 10). Thus, in order to invest money in the region, it is important to create a good environment for the investors apart from the infrastructural and amenities.

The projects related to the Look East Policy are monitored by the respective state governments. It is possible to expect that some of these states are not

interested to implement the projects. For instance, India and Myanmar signed an agreement to set up border trade in 1994, the next year Manipur state government inaugurated and formally made the custom station function but in the case of Mizoram it was inaugurated only in 2015. It means that, it took two decades to inaugurate a custom station after they signed the agreement. This might be due to lack of infrastructural at the inception as compared to Manipur. But it's too long to open only one Land Custom Station. It shows that there are some loopholes in the implementation of the project. Likewise, though the Look East Policy was adopted in 1991 the NE was included as a part of the Look East Policy only in 2003. It was too long to have full-fledged the policy. Even after one decade, there is no visibility to fully implement the projects. The infrastructures in the NE are still in a bad shape and particularly the roads of the Land Custom Station s are lackluster and there is a need to urgently resurface the road. There is no proper power, bank and mobile connectivity. MrNeihisial, the Custom official in Mizoram mentioned that many of the trade items are agricultural products but there is no food laboratory machine at Zokhawthar. The nearest place is at Shillong and by the time they send the goods for to be tested for import, perishable goods lost their value and some are decomposed. And he further said that, that is the big problem for the border in Zokhawthar. In the case of Myanmar, it is much worse than Mizoram. The roads are all unmetalled. Therefore, the slow process for the implementation and shoddy infrastructural are the main challenges of the implementation of the Look East Policy.

The Land Custom Station of Moreh in Manipur is the busiest LCS among the NER trade with Myanmar, handling almost 99 percent of the international trade (Research and Information System for Developing countries 2011). Meanwhile, Moreh LCS is also not much better than the LCS of Zokhawthar, Mizoram. All institutions connected to border trade are understaffed. It is assumed that that these will obviously hamper the functioning of the trade at the LSC.

Border trade is one of the most important parts of the Look East Policy to link NE people and the SE Asian countries. But there are some defects at the trade system and trade-able items. The two governments of India and Myanmar agreed to practice Barter trade system at the Border trade. According to this system export from one country needs to be balanced by import to that country by individual traders (Bezbaruah 2007:92). For instance, if they export 10000 US dollar value of goods from India and they must receive import from Myanmar the equal amount of their export. This is a big malaise of the trade in the border. Even one of the Custom officials expressed that sometimes even if we want to export from Indian side, the Myanmar authorities do not want to export anything; therefore traders and business men face problem of their export of their goods. Therefore, it hinders the

free flow of the trade between the two border areas. In addition, it is disadvantages for the Indian side.

Another defect related to trade system in the region is trade items. The trade items are mostly related to agriculture products. Apart from these agricultural products, it includes daily basic needs and some machine parts. There are no costly valued trade item goods. In addition, it encourages corruption among the custom officials and increases informal trade volume. Some goods which are not included at the trade items are still available at the local market. It means that, the traders and businessmen bribed the custom officials. Therefore, those goods are also selling at a high cost to recover their bribe money. These goods are mostly the products of China and other Southeast Asian countries. For instance, blanket, cloths, electronic products, decoration of house etc. Apart from these, the precious stones like gems and gold are also sometimes seized by the local authorities from the traders and business men. Myanmar is rich in mineral resources, so in order for the people of NE India to utilize the resources of Myanmar, the government of Indian authorities need to revisit the trade items and it is possible that they could add more items and include the third party products. Apart from all these, to include the third party product will also help the Myanmarese traders to balance their barter trade and it will smooth the functioning of the trade exchange (Das et al. 2005:61)

Conclusion

From the above discussion, it can be argued that India could not build up stable and cordial relations with the ASEAN states during the Cold-War period. The end of the Cold War brought a new environment in the international politics which in turn opened up new possibilities for India to build warm relations with the ASEAN states. After India adopted Look East Policy, the relations between India and the ASEAN countries have been gradually improving. The Look East Policy is one of the important initiatives of India to move towards South East Asian countries as well as the development of the North Eastern Region (in India). Therefore, the Government of India has taken many steps and initiatives under Look East Policy to link the South East Asian countries and the development of NE region. As part of operationalization of the Look East Policy, India tried to connect the South East Asian countries through the NE region in order to solve the landlocked nature of NE India. It is widely held that backwardness of North East India is due to geographical constraints and lack of infrastructure. Thus, the Government of India give efforts towards the infrastructural development of the region therefore, proposes many schemes and implementing projects relating to North East India and the ASEAN countries. It is predicted that projects are fully implemented; it will really bring many opportunities for the North East India.

In addition to the infrastructural development, the government of India has taken up trade linkages of NE India with South East Asian countries. The government of India tried to open many border trade centers between the North East states and Myanmar. So far, two Land Custom Stations have been formally operating i.e Moreh (Manipur) and Zokhawthar (Mizoram) in NE region. Meanwhile, to optimally get the benefits of the border trade for the North East people, the current trade items need to diversify as the current trading items are mostly agricultural items and centered on daily basic needs in the meantime. Many commodities of the third party products are smuggled in informally to bribe the custom officials and this encourages corruption as well. Apparently, the exchange of the small amount of agricultural products and daily basic needs are not enough to raise income and development of the region. Therefore, the government of India has to convince the Myanmar government and need to add some more items of the third party products in the border trade items. This will lead to reduction of corruption and increase the trade volume as well. Besides, the trade items, it is also important to reconsider the trading system in order to exchange the goods smoothly without delay.

Above all these, as mentioned earlier, the larger benefits of Look East Policy lies in addressing unemployment problem in North East India, therefore, the government of India has given emphasize on the generation of employment opportunities in the region. But as the rapid growth of population manifests, employment opportunities inside the region will not able to provide each of the needy jobs. Therefore, it is very important for the Government of India to look at employment generation for the youths of NE in South East Asia and East Asia. Therefore labour migration is another strategy India will be aiming at through LEP. In addition, some of South East and East Asian countries are highly advanced in technological sphere and there are many reputed Universities of international standard. Thus, educational North East India and SE can be enhanced. This can further contribute the enactment of human resources and improved technological skills. Overall, through the operationalization Look East Policy, India is aiming for improved connectivity and trade with South East Asia as well as addressing developmental concerns of North East India.

Notes

- *1 There are three types of trade system in Indo-Myanmar border. The first system is traditional exchange system, Barter system and Normal trade system. Traditional exchange system operates under the barter system. Under this trade system, the local people of both the countries residing upto 40 km. on either side of the countries can exchange goods of the locally products upto 1000 US Dollar under simplified documentation without Importer Exporter Certificate from DGFT, GR formalities and by way of head load or non-motorised transport system.

- 2* Barter trade system is the exchange of goods between the local people of both side of the countries i, e India and Myanmar. According to this system, 22 agreed trade items are exchangeable up to 20000 US Dollar with formalities as per DGFT PN No. 289 (PN) 92-97 and on payment of customs duty. As per this system, traders should possess IEC allotted by Directorate General of Foreign Trade (DGFT). The trade item should be locally produced commodities mainly agriculture products and minor forest products.
- 3* Normal trade system is also called Regular trade system. This system operates under the Letter of Credit System as per EXIM Policy guidelines.

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The Sanitation Scenario in Kerala: Lessons from the Coastal Belt

Oommen John and Sherine Chacko

The right to sanitation is an extract from the universally acknowledged right to adequate standards of living. Sanitation has implications to be drawn from the fact that each one on the planet is entitled to sanitation services that provide privacy and ensure dignity, and that are physically accessible, affordable, safe, hygienic, secure, and socially and culturally acceptable. However, women, men, and children often do not have facilities that reflect the content of this right in various settings, including in schools, migration and displacement camps, prisons, work sites, and even their homes.

In 2015, 39 per cent of the global population (2.9 billion people) used a safely managed sanitation service; that is, an improved toilet or latrine which is not shared, from which excreta are safely disposed of in situ or treated off-site. 2.3 billion people still lacked even a basic sanitation service, defined as use of improved sanitation facilities which are not shared with other households. 892 million people used no sanitation facility at all, and continued to practice open defecation. From 2000-2015 the population using basic sanitation services increased by over 1.4 billion people, or 0.63 percentage points per year. Urban-rural disparities persist: 7 out of 10 people that do not use basic sanitation services live in rural areas. The United Nations 2030 Agenda for Sustainable Development calls, in its Goal 6, for access to adequate and equitable sanitation and hygiene for all by 2030 and for an end to open defecation. To achieve that goal, governments and donors need to address sanitation as a human right and make funding commitments to eliminate barriers to sanitation and to address discrimination. They should also make sure that participation by the groups is ensured and accountability for a lack of adequate facilities are built into their investments in sanitation.

Sanitation as such is a multi dimensional in nature. Lack of sanitation affects the lives of billions of people worldwide. It is now generally agreed that sustainable solutions to this complex problem require social and cultural factors to be addressed in addition to the habitual economic and technical aspects. It can safely be said that the fragmented approach to sanitation is indeed limiting its output. This refers primarily to the fact that dissemination of knowledge on the subject from the political end to the various concerned institutions, which independently tackle specific aspects of the issue, is not specific. Moreover the concept of multi stakeholder participation is visibly dead herein. The approach is often from the provider to the receiver basis. A Holistic approach has often been suggested as a solution. The National Urban Sanitation Policy (NUSP) of the Government of India announced in 2008, entrusted state governments to prepare their State Sanitation Strategy (SSS) in line with constitutional provision. Sanitation' is a subject matter included in Entry 6 of the State List as established through Article 246 of Constitution of India.

Kerala, one of India's smallest states, is located on the south-west coast of the peninsula and stretching 580 km in length and 30-130 km in breadth, it has a land area of 38,800 sq. km. Kerala's population (in 2011) of 33.3 million accounts for 2.8 per cent of India's population. Population density is 859 persons per sq. km, one of the highest in the country. It also has the highest literacy rate, which increased from 90.9 percent in 2001 to 93.9 percent in 2011. Kerala is unique among Indian States, with a consistently higher level of human development comparable with that of many advanced countries but with a much lower per capita income (Government of Kerala 2005). Kerala ranked first among major States in India in the Human Development Index in 1981, 1991, and 2001, but its per capita income lagged behind the all-India average until recently. In recent years public demand has been focused on ensuring that high priority is given to the development of improved service delivery such as education, health, and water supply. The state government is a strong supporter of decentralization and in 2000 it started transferring about 35 percent of its planned development funds directly to local authorities as developmental grants. The Accelerated Rural Water Supply Program, launched in 1972-73, was India's first governmental water and sanitation services effort. It was followed by efforts to strengthen the central public health and engineering departments. Between 1974 and 1975, the Minimum Needs Program contributed to improved public living standards by providing services such as basic healthcare, educational programs, and water supply and sanitation. Between 1985 and 1986, the Government of India launched the Centrally-Sponsored Rural Sanitation Program (CRSP). The program mandated that the central government and individual Indian states would split the costs of services evenly, while state

governments communities and individual households were empowered to make the final decision to install latrines and paid a percentage of the capital costs of construction. The Kerala Water Authority (KWA) created four socioeconomic units (SEUs)—one each for the northern, central, and southern parts of the state, along with a coordinating body in Kerala’s capital—to assume responsibility for providing on-site rural sanitation, for which the KWA had no clear mandate, and to address the social development implications of rural sanitation, with which KWA had little expertise. The SEUs piloted activities in Kerala’s water and sanitation sector in partnership with the KWA. The SEU pilot programs tested sanitation strategies implemented by the Panchayats, local NGOs and semi-governmental institutions, and the SEUs themselves. Each strategy focused on providing effective, low-cost, on-site sanitation mechanisms, particularly the twin-pit pourflush latrine. A 75 percent subsidy available to qualified households enhanced the accessibility of sanitation services. A key goal was to provide at least 40 percent of the subsidies to poor households.

The open dumping of septage has become a major issue for Kerala and a threat to its progress. While open defecation means faecal matter is spread around in smaller quantities, septage dumping means discharge of highly concentrated pathogens with potential to cause significant health and environmental damages. Local newspapers are frequently reporting on incidences of septage dumped in water bodies and paddy fields and villagers agitating against illegal dumping, even sometimes beating up the workers of the operators, citing the plight of villages where septage brought from cities is contaminating their drinking water sources.

Coastal wards have shown low mean for solid and waste water disposal, sanitation practices and facilities, Bathing practices and facilities, water availability and health problems. This area is in urgent need for intervention for a healthy community with healthy people, so sanitation facilities should be addressed. Awareness level of people is same as those of central wards but the awareness level itself is not enough for a healthier community Kerala has been the third state in India after Sikkim and Himachael Pradesh to be declared Open Defecation free. However the truth seems to a far cry from this especially amongst the Tribal and Coastal Communities of the state.

Moreover, becoming defecation free is just one aspect of the sanitation umbrella. Surprisingly, Kerala has often been found lacking in those other aspects .This is specifically visible in certain communities .Issues like solid and liquid waste management, seepage concerns, lack of toilet facilities for individual households are still obvious. The coastal fishermen community are one such particular case. This community resides in densely populated areas and one can find health and hygiene issues in abundance here. In a state like Kerala, it is such communities that

need to be given priority especially in this era where “sustainable development” is the watchword.

Oommen John et al. in association with Centre for Human Resource Development, CRTCN (Research) & CDC conducted a study amongst the coastal fishermen community of Allapuzha and Thiruvananthapuram district with respects to the behavioural dynamics related to sanitation herein. Majority of the participants were natives of the coastal area for a sufficiently long period. 13% of the sample (which was 600 in number) reported having no toilets attached to their homes. These basically are from the older generation, i.e.60 and above. The number comes to around 78, which might seem insignificant, but we need to look at it from a broader perspective. These 78 people are simply those who openly admitted to Open Defecation, some by choice and some due to lack of option. The number could be even greater than what has been reported. The absence of Community Sanitary Complexes or even the ill functioning of those has even aggravated the issue. Here we can see the behavioural manifestations of the people and their attitude towards the ODF thing. According to the G.O No.S-1101113/2015-SBM Government of India *Ministry of Drinking Water and Sanitation* for declaring a Gram Panchayat ODF , it is not necessary that every Households needs to have a toilet of its own. A community toilet or a toilet shared by two households is also taken as an indicator for ofd status. Kerala too followed the same guideline, and the results of the household survey reflect this and it is not the complete truth.

100% usage of toilets leading to no open defecation was another consideration during the survey. During the study it was found that a sizeable population admitted to be resorting to open defecation. The reason cited was merely their convinence during their work hours. The location of the CHC's should be in a place where it is accessible for the people of the community .In the case found in Alappuzha, there weren't any on or near the beach. As a result fishermen on their transit from the sea would resort to open defecation than use the toilets. This is again a sham on the LSGI's who should ideally take the necessary action, in both setting up of CHC's as well as renovating the mindsets of the people.

Fly proofing is something that was ought to be noted as part of physical observation in the ODF survey. The Research bore testimony to the fact that, it was found that a sizeable population were veteran's this issue. 36.7% of the households were striked of. Strangely enough, this hardly reflected in the Odf survey.

The safe septage disposal turned out to be the most alarming of the lot. While most of the people claim to safely disposer faeces and having septic tanks in their households, a notable percentage did have an alternative picture which surprisingly seems to be concealed from government purview. Thrikkunapuzha GP and its residents admitted to an outlet from the HH toilets to a water body.

These water bodies are like swamps that are thick and mushy with dirt. Another notable aspect is that these are the outlet for releasing septic waste from most of the households. This phenomenon is not new to the area. The view itself is enough to raise many a guess about the sanitation arrangements in the place. This was a common sight in most places in the GP. While the officials and representatives of the local LSGI admitted to the issue, nothing tangible has been done to tackle the issue. Many of the households are surrounded by water bodies thus contaminated. This itself speaks volumes of the sanitation issues and interventions of LSGI's in the area. The IEC spread by Suchitwa mission and the Local self governing bodies promotes the concept of "my waste, my responsibility." However this message does not seem to have percolated into the grassroots level. The common people here seem to be disposing their waste either by dumping them into some pond or canal, or by throwing it into another person's backyard.

State government initiatives

The State government's campaign to make the State completely free from waste started on the Independence Day August 15, 2017. The 'Freedom from waste' campaign being organised under the aegis of the Suchitwa Mission & Haritha Keralam Mission of State government is led by local self-government institutions in association with the public. The "freedom from waste" started off with a declaration made by Ministers in all districts on August 15, after the Independence Day functions.

Comprehensive and scientific projects are being planned for waste management at source. The approach will be to encourage waste management at source in houses, gated colonies, markets and industrial units as per Kerala Municipality Act Section 334 (a). However, community-level projects for waste management will also be evolved. The implementation of the projects began on November 1. Community participation will be ensured in the project from the grassroots level. Local bodies will be responsible for the implementation of the projects. The campaign will concentrate on making a significant change in the age-old habits of the public in the State to include waste management in it.

Community sanitary complexes are proposed to be set up when there is inadequate space in the village for construction of household toilets and community/GP owns up the responsibility of their operation and maintenance and gives a specific demand for the same. The maximum support per-unit prescribed for a community sanitary complex is Rs. 2 Lakh. Sharing pattern amongst central government, state government and community shall be in the ratio 60:30:10.

174720 toilets have been constructed in rural Kerala including critical areas like remote Tribal hamlets and water-logged areas. The initiative of the state

government through an effective campaign for short span of 6 months resulted in this historic achievement. The total assistance for SLWM projects shall be worked out based on the total number of households in each GP subject to a maximum of 7 lakh for a GP having up to 150 households, Rs. 12 lakhs up to 300 HHs, Rs. 15 lakh up to 500 HHs and Rs. 20 lakh for GPs having more than 500 households. Funding of SLWM project under SBM (G) is provided by central and state government in the ratio 75:25.

The Kerala Rural Water Supply and Sanitation Project was a pioneering grassroots approach initiated by the government of India. The project aimed to revolutionize sanitation services in the South Indian state of Kerala, with the primary goal of improving public health. An array of social accountability tools instituted in Kerala addressed the significant governance problems that had hindered water and sanitation reforms in local and national programs. Challenges to reform included a lack of accountability and transparency and broad corruption, which made local sanitation and hygiene problems more difficult to solve and accelerated the spread of infectious diseases throughout densely populated Kerala. Corruption therefore affected all segments of the population, particularly the poor and marginalized.

Simply having access to sanitation increases health, well-being and economic productivity. Inadequate sanitation impacts individuals, households, communities and countries. Despite its importance, achieving real gains in sanitation coverage has been slow. Kerala is a forerunner in human development index and has its health parameters as comparable to that of many Scandinavian countries. However the coastal belt is relatively a poor case. The government should indeed view the sanitation issues of the coastal population with utmost seriousness. Community sanitary complexes (CSC) should be well maintained. The concept is good but for the people to actually use them, water as a basic amenity should be available or else the very purpose of these CSC's is going to be lost. The people are not making use of the CSC's and this itself is a failure on the [part of implementing officials. If the beneficiaries do not own up the process, the effort itself is wasted. Sanitation has a multi faceted dimension. The people in the coastal areas are often found to be lacking in resources that enable them to give low priority to sanitation. Their basic needs are of more importance than such values that the outer world expects them to uphold. The coastal belt is a very sensitive area. Talking about hygiene practices is not easy here. IEC has a very good role to play here. The Community needs to be organized in a way that they own up the issue. The concept of menstrual hygiene should be taught to the women in the area. School going adolescent girls are found to be still using cloth during mensuration. Use of sanitary napkins should be encouraged. It is the cost of these napkins that prevents them from using it. Water scarcity especially in months of water shortage is an issue that needs to be

addressed. People should be motivated to conserve water. In terms of sanitation water scarcity becomes an issue as this gives the people an excuse to resort to open defecation. The Panchayath should arrange classes at the Grama Sabha in this regard. Behaviour modification is needed in order to realize the dream of total sanitation in the coastal areas. Until and unless each one makes good hygiene a part of their life, this total sanitation cannot proceed beyond its present mythical status. h. The IEC activities on sanitation in the coastal areas is not good. The issue is multifaceted and intense but that kind of importance is hardly given. It has been seen that almost everyone has a good idea on what proper sanitation is but it is not put into practice. i. Poor sanitation is also a cause for financial losses especially with regard to hospitalisation. Poor sanitation causes economic losses associated with the direct costs of treating sanitation-related illnesses and lost income through reduced or lost productivity. Lack of proper awareness about the government initiatives is clearly lacking amongst the people of the coastal areas. Their participation is necessary and only then will a collective sense of ownership come about. IEC activities need to be taken seriously.

Way Forward

Sanitation is one of the most productive investments a government can make. There is meticulous pragmatic evidence that proves that improved sanitation systems improve the health standards of a particular. In short, the benefits of sanitation investment are huge.

Poor sanitation is a leading cause of child mortality. Today, an estimated 800 children under five years of age die every day from diarrheal disease caused by lack of hygienic water and sanitary living situations. Approximately 950 million people also still defecate in the open. This exposes areas to the risk of disease and results in a range of social and economic problems. The gravity of the situation has elevated the topic to the top of the global agenda. In September 2015, the 2030 Agenda for Sustainable Development was adopted by world leaders. Goal 6 of the 17 Sustainable Development Goals (SDGs) calls for access to water and sanitation for all. Kerala is much better off when compared to most states in India.

The state governments can visibly act on their commitment to sanitation and hygiene by commissioning a thorough review of policy and institutional arrangements. At the National level governments can recognise that a radical overhaul of organisational structures and institutional arrangements may be needed to ensure that the right people are in the right place to support sanitation and hygiene promotion; allocate money for this overhaul and for training (and retraining) of public sector staff; and establish financial incentives for small-scale private sector development and for the entry of civil society organisations

into sanitation and hygiene promotion service delivery. Local governments can contribute to making sanitation and hygiene a reality in local settings by allocating resources to public and school sanitation, reviewing local planning and technical regulations for opportunities to improve sanitation and sponsoring hygiene promotion and sanitation marketing. Civil society can do its fair share by raising the profile of sanitation by lobbying local government for sanitation and hygiene promotion programmes

Households can be vocal and active – encouraging local authorities to champion sanitation adopt good sanitation and hygiene practices and serve as role models for others and seek ways of acting collectively with neighbours to improve and maintain sanitation facilities. In coastal areas of Allapuzha and Thiruvananthapuram it was found that in areas where there are poor sanitary conditions, it is the laid back attitude of the people themselves that has brought about the present state of affairs. Since 2005 “Clean Maarari” project is being implemented. As part of this an “Arogya Sena” .The “Arogya Sena” is in charge of conducting sensitisation programmes with respect to sanitation in the area. Street plays and awareness classes have been conducted in the past. Maarikulam also boasts of have a kitchen from in each household within the jurisdiction of the Gram Panchayath. This is an achievement for them as organic farming along with sanitation is the priority of the state government for the current year. It is admirable that the gram Panchayath president himself was very well informed about the developments within the Panchayaths and is a visionary as well. This again is another reason for the development of Maararikulam Gram Panchayath.

Effective sanitation and hygiene programmes need to combine interventions to change behaviour with the selection of the right technology. Changing behaviour requires culturally sensitive and appropriate health education. People need to understand, in terms meaningful to their lifestyles and existing belief systems, why better health depends on the adoption of hygiene practices such as hand-washing (after defecation, after handling babies’ faeces, and before cooking), on the use of latrines for safe disposal of faeces, and on safe storage and handling of drinking-water and food. Raising awareness of why sanitation and hygiene are important will often increase motivation to change harmful behaviour.

As in most cultures, in Kerala too women have the primary responsibility for water, sanitation and hygiene at the household level. Women play a crucial role in influencing the hygiene behaviour of young children. The effective use of sanitation facilities will therefore depend on the involvement of both women and men in selecting the location and technology of such facilities. It is also essential that facilities are designed to accommodate the special needs of children. The availability of water and sanitary facilities in schools can reduce the likelihood

of girls dropping out as is found in many states of the country. The design of the latrine and the location of water points and toilet facilities close to the home can increase women's health and dignity – and ultimately reduce violence against them. The Government can frame policies in a way that enshrines the idea of gender and equity at the centre of sanitation and hygiene promotion. In any sanitation program, technological intervention is necessary and to supplement it dissemination of information, training of community members and mobilization of the community is a must or else the project is doomed. Many sanitation programs are planned and executed by government bodies, and few are successful due to the failure to convince and educate the people of the importance of sanitation and the need for an active cooperation. Education factors play a very important role because it is only through the basic understanding of the need for sanitation can the people be mobilized for its implementation. Another issue about the coastal communities is the need to inform the community members about the health and environmental hazards caused by their traditional practice of defecating on the surface waters and on their solid liquid waste management practices which are so unscientific. It is only when they understand the consequences of the unsanitary conditions they have that they will be willing to change their habits.

When new sanitation technologies are introduced, planners must find ways to bring the project into balance with community knowledge, attitudes and behaviour relating to health and sanitation. The proposed system should not be too complicated for the user to operate and maintain. It should not require radical behavioural changes that the community will eventually reject it. And most importantly, community training provided will ensure that the skills required to construct and operate the improved facilities are within the local capability. These requirements emphasize that usage and sustainability are critical to the success of sanitation projects. Unless facilities are suitable for the people using them and unless the technologies are affordable and efficient, the facilities will remain unaccepted and underused. Gender provisions should address both the practical and strategic needs of men and women, which differ according to culture and traditions, location and other factors, as well as an appropriate strategic approach that takes into consideration these differences. The provision of sanitation is a key development intervention – without it, ill-health dominates a life without dignity.

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Contending Narratives of Indian Nationalism and New Social Movements

Mathew Joseph C.

The nationalist discourse in India has passed through various stages. It is largely a product of the encounter between colonial domination and the resistance to it (Satyamurthy 1997: 715). In that sense it has a history of less than three hundred years. The ultra-nationalist historians and a section of the liberal nationalist historians always oppose this by upholding a continuous history of India anchored around the 'Hindu civilization' for almost uninterrupted five thousand years. They project the broad category of Indian nationalism as the culmination of that long historical process. For them this long continuous history of India is a struggle to realize the inner self of India. ¹ According to this narrative, albeit the predominant one, the 'original' inhabitants of India had to fight with various 'invaders' who were 'foreigners' and belong to 'other' religious and cultural ethos.

The notion of a continuous history is a myth. History is actually a continuity of ruptures and disjuncture. An uninterrupted history of a particular geographical area will always try to obliterate the ruptures in abundance in the real history of that area and construct a linear narrative with lot of dramatic developments in it. Similarly, history on a large scale like World history, European history, African history, Chinese history, Indian history etc. also is in a way an absurdity as it will submerge the specific histories of the diverse regions within the histories of the vast geographic entities.

In the light of these two methodological issues pertaining to the writing of history one can arrive at the different problems of the existing official and predominant historical narrative of India. The various streams of the nationalist discourse in India are based on this official narrative. Depending upon the ideological perception, the actors in history and the prism through which events are viewed changes. This is largely true with the traditional Marxist history writing on India too.

The presupposition of an 'imagined community' called 'nation' having a geographic space of its own and with permanent or shifting boundaries is a prerequisite for the invention and construction of a 'nation-state' (Anderson 2003). In the grand narrative of the Indian nationalist discourse one can see two main trends: the cultural nationalist variety revolving around the 'Hindu' identity of India and the other one which is anchored around the notion of 'composite' nationalism.²

The cultural nationalist narrative tried to glorify the 'Hindu' past of India and portrayed the pathetic condition of colonial India as largely the result of the deviation from the cultural-moral universe of that 'golden era' existed in the 'ancient' period. In this narrative the domination of Muslim dynasties on India (north and to an extent central India) in the 'medieval' times was also considered as deviation from the erstwhile 'golden era.' For the cultural nationalists, the medieval (Muslim) and modern (British) periods of Indian history only represent a humiliating episode in the long continuous history of India.³ It is an irony that the cultural nationalists who had fallen into the trap of the colonial historians who created a 'continuous' Indian history with an absurd periodization (Thapar 2004: 5) like ancient (Hindu) history, medieval (Muslim) history and modern (British) history.⁴

The composite nationalist narrative also firmly believes in the uninterrupted long history of India. Unlike the cultural nationalist narrative, this one tends to view the categories of 'Hindu' and 'Muslim' as essentially non-antagonistic in nature. It assumes that the Hindu-Muslim/ancient-medieval periods of Indian history were largely an era of mutual coexistence. The syncretic tradition of Indian art and music are cited as examples of this. The visualization of inter-communal harmony in the past by the composite nationalist narrative made possible the participation of Hindus and Muslims in the anti-colonial struggle in large numbers. The success of many of the agitational programmes like the Khilafat Movement organized by the Indian National Congress can be cited as examples of this (Minault 1982: 67).

Both the cultural nationalist and the composite nationalist narratives share many similarities. Both of them unquestionably accept the uninterrupted flow of Indian history from time immemorial. In the geographic imagination of both these narratives, India is largely the north and the north-west of the present day India. South India and eastern India were always considered as the peripheries of an 'authentic India'. The mindset created by these narratives is still evident in the form of the neglect of the histories of both South India and Eastern India in the curriculum of history in majority of the universities in India.

Apart from these similarities they remained distinct in one major aspect: the exclusiveness of cultural nationalist narrative and the inclusiveness of the composite

nationalist narrative (Bapu 2013: 62). In order to place the 'native' Hindus on a higher pedestal there was no option for the cultural nationalists to exclude the 'others/foreigners' from the mainstream of their nationalist discourse or give them a secondary position as far as the national life is concerned (Golwalkar 1947). The composite nationalist narrative on the other hand had allotted legitimate spaces for all religious and ethnic groups in its discourse.

The Muslim nationalist narrative which developed from the thinking of Muslim reformers like Sayyid Ahmed Khan and Muhammad Iqbal later got crystallized as the movement for Pakistan under Mohammad Ali Jinnah. It could not distinguish between the difference between the narratives of cultural nationalism and composite nationalism. For the protagonists of Muslim nationalism, the narratives of both cultural nationalism and composite nationalism emanate from the same Hindu stand point. As a consequence the Muslim nationalist narrative became the mirror image of the cultural nationalist narrative. The post-colonial fault lines in South Asia are the natural outcome of this misperception.

The above mentioned three narratives were constructed on the basis of the writings and inferences of the 'orientalists' (Said 2003). In the 'orientalist' conception, India emerged as an anti-thesis of the modernizing Europe. On the impact of orientalism on the European mind, Romila Thaper observes the following:

Orientalism fueled the fantasy and the freedom sought by European Romanticism... The cultures of Asia were seen as bringing a new Romantic Paradigm. Another Renaissance was anticipated through an acquaintance with the Orient... It was believed that this Oriental Renaissance would liberate European thought and literature from the increasing focus on discipline and rationality... (Thaper 2004: 4).

The scholars like Sir William Jones and later Max Muller followed this line. The body of work brought out by the orientalists on behalf of the Asiatic Society bears testimony to this.⁵ They tend to romanticize India and her past. They always juxtaposed the glorious past of India with its plight in their time. The cultural nationalists and the composite nationalists were very much influenced by the 'orientalist' construction of India.

The personality and worldview of Jawaharlal Nehru had taken shape in the context of these varied streams of nationalist discourse. He subscribed to the 'composite' variety of the nationalist discourse and became one of the foremost exponents of that. His seminal work *The Discovery of India* testifies that (Nehru 2004). In this work he conceptualized India as a land of diverse religions and cultures yet united by a unique spirit which he termed as 'unity in diversity'.

When he became the Prime Minister of India he wanted to reconstruct India as per his imagination. His stress on modernity, scientific temper, secularism and

development must be viewed in this context (Khilnani 2003). As the champion of the composite Indian nationalism he tried to link Indian tradition with modernity as he understood. He believed that secularism is the corner stone of the inclusive composite nationalism without which India cannot modernize herself and survive.

In the pre-independence period, the Indian National Congress promised that it will reorder India on the basis of languages when India gets out of colonialism. The various Pradesh Congress Committees were set up on the basis of this assumption. However, in the immediate aftermath of Partition, Nehru refused to go by the earlier promise of the Congress to the people. The linguistic reorganization of states in mid 1950s happened after popular protests.⁶ Nehru partly was terrified by the experience of Partition and he thought that linguistic reorganization will result in the withering away of India.

The model of India put forth by Nehru largely remained intact till the middle of the 1970s. The 1970s witnessed tumultuous changes in Indian polity. The decade of 1970s was marked by peasant uprisings and emergence of sub-national movements (Satyamurthy 1997: 718) throughout India.⁷ The Nehruvian model of India based on 'unity in diversity' began to show cracks in its edifice. The declaration of Emergency in 1975 and other draconian methods, according to the leaders of Indian National Congress, were aimed at the protection of the edifice of the Nehruvian conception of India. It is another matter that had Nehru been alive, the Emergency and associated atrocities would not have happened in all probability.

The peasant uprisings and the gaining of importance of the sub-national movements gave sleepless nights to the Indian establishment in the late 1970s. The only way available to the Indian ruling elite to escape from the political crisis engulfed them was to shed the mask of composite nationalism and embrace cultural nationalism. This shift in Indian politics has taken place in 1980s (Hewitt 2008: 10). The religious minorities of Muslims, Sikhs and Christians became the victims of this political volte-face of the political elite which hitherto subscribed to composite nationalism.

The embrace of cultural nationalism by the political elite has transformed the nation-state of India and consequently the nature of the Indian state. The organizing principle of Nehruvian India – secularism – has been dubbed as an import from the West. Even though secularism was never practiced in India in its strict spirit, it was considered as the bedrock of the composite Indian nationalism and the nation-state of India. In the changed circumstances, the essence of secularism – the strict division of state and religion – has become questioned as a wrong thing. The extreme votaries of cultural nationalism have even termed the real essence of secularism as pseudo-secular (Jaffrelot 1996: 376).⁸ In the eyes of

the proponents of cultural nationalism an authentic Indian has to be an upper caste Hindu heterosexual male. The rest are considered to be aberrations.

This historic moment of transformation of within the realm of Indian nationalism has witnessed many contestations from the margins. In fact, some would argue that the authoritarian shift in Indian polity was a deliberate design of the ruling classes to contain the surge of various mass movements from the margins of Indian society. The environmental movements throughout the country like the Chipko Movement in the Himalayas (Weber 1989) and the Narmada Bachao Andolan (Baviskar 1995) who questioned the ethical basis of the state sponsored 'development' projects are a good example of these movements from the margins. Other marginal movements like the feminist movement, the Dalit movement, the movements of various religious minorities, the civil rights movements and the movements of the sexual minorities also gained strength in this period.

The above mentioned movements can be termed as 'New Social Movements' (Omvedt 1993). These movements defy the categorization of either 'left' or 'right' and they are not clamoring for state power. Capturing the seat of power is not the aim of these movements. They are more concerned about the ontological and existential issues and dilemmas of the groups they represent. In the process of moving ahead they had to encounter the dominant thinking of the traditional elite and challenge the epistemological base of that. This anti-hegemonic drive of these movements created thereby an alternate epistemology.

Armed with this alternate epistemology these movements from the margins questions the very essence of our long held believes of a glorious and unique 'Indian tradition', all embracing Indian nationalism and an uninterrupted 'Indian history' since time immemorial. The established notions of 'Indian tradition' and Indian nationalism are struggling hard to hold on to their preeminent status in the contemporary political discourse in the context of the emerging epistemological challenges from the margins.

The anti-caste and Dalit movements successfully exposed the oppression embedded in the Indian tradition. The dent made on the caste society by people like Jyothiba Phule, Ambedkar, Periyar EV Ramasami Naicker, Sri Narayana Guru and Ayyankali in the late 19th and 20th century was further expanded. The critique of Brahmanism advanced by these great souls has been elaborated and put across the political realm and public space by the Dalit movement. Through this the Dalit movement (Hardtmann 2008) has succeeded in de-legitimizing the Brahmanical social order, which is the basis of the contending narratives of Indian nationalism, to a considerable extent.

The environment movement in India could challenge the logic of present development regime pursued by the ruling classes. The environment movement in

India is not merely a struggle of tribals against big dams and mines as portrayed in the media. It questions the very foundations of our development planning and priorities. It brought out the issues of environmental justice, ecological balance and sustainability in the public realm (Dwivedi 2006). It is important to mention that a critique of the existing development regime is automatically a critique of the nation-state which sponsors that.

The feminist movement has questioned the way 'Indian nationalism' has been constructed. In the feminist understanding the Indian nationalist discourse in its various forms and manifestations are highly male dominated and male centric. Similarly they contest the credentials of the glorious 'Indian tradition' which oppressed women beyond imagination. The feminist critique of the cultural nationalist narrative is that it valorizes the past without questioning and tried to create a utopia out of it.

It is easy to dub the movements of the religious minorities for the protection of their religious and cultural rights as communal. In the heyday of composite nationalism it was the responsibility of the 'secular' state to ensure the religious and cultural rights of the minorities. In the context of the ascendance of cultural nationalism as the state ideology the religious minorities have no other way but to speak and act for them to protect their religious and cultural rights. The limits of the assertion of religious minorities for their rights have been shown by Gujarat in 2002 (Oommen 2008) and Orissa in 2008 (Kanungo 2008). The experience of religious minorities is an eye opener in the context of the dominant understanding of India being a religiously tolerant country.

The civil rights movement in India has come a long way. The authoritarian turn in the Indian polity in 1970s were effectively checked by the civil rights movement. It continues that tradition even now. The activities of the People's Union for Civil Liberties (PUCL), the People's Union for Democratic Rights (PUDR), the Andhra Pradesh Civil Liberties Committee (APCLC) and the Human Rights Forum (HRF) are examples in this regard. The life time contribution of people like K. Balagopal of the HRF (Gudavarthy 2009) has also enriched the public space and democratic process in India.

The movements of the sexual minorities are new in the Indian context. The existence of sexual minorities was almost a non-issue in the dominant Indian thinking. Alternate sexual practices were always considered as an aberration and abnormal. These 'abnormalities' are still punishable under Indian law. Of late a section of the Indian civil society and media started showing a considerable amount of sensitivity towards the hapless sexual minorities. The Delhi High Court has come out with a historic judgment by de-criminalizing homosexuality of the Indian Penal

Code (IPC) on 2 July 2009 (Mitta and Singh 2009). However, the Supreme Court has rejected this and reinstated the earlier position. Of late, the Supreme Court has agreed to reconsider its 2013 verdict of reinstating Article 377 of the IPC (Kavi 2018). Still the political class in India has not come to terms with the rights of sexual minorities yet their existence is more or less accepted.

The grand narrative of Indian nationalism which includes both the cultural nationalist and composite nationalist varieties is not in a position to involve and accommodate the above mentioned new social movements and their refreshing insights regarding society, culture and nation. The critique offered by these movements has shaken the base of the varieties of Indian nationalism anchored around a glorious past and a long continuous history of Indian tradition. There is no doubt that the proliferation of the marginal movements and their critical view of Indian tradition will definitely transform and democratize our society in the long run.

Notes

- 1 The historians subscribing to the Hindu nationalist project as well as liberal secular project of Indian nationalism believe in the continuity of the Hindu 'core' of India and Indian historical trajectory of a very long uninterrupted period starting from the early civilization in India.
- 2 Bal Gangadhar Tilak and Vinayak Damodar Savarkar were the main representatives of the cultural nationalist variety of Indian nationalist discourse, while Jawaharlal Nehru represents the composite nationalist discourse.
- 3 The glorification of the ancient past is an important aspect of the cultural nationalist political project. This is an essential component of the ideological edifice of the Hindu right wing forces to delineate the 'natives' and the 'foreigners' and reconstruct an India which in their collective imagination completely sanitized from all the 'foreign' impurities.
- 4 The British historian James Mill made this absurd periodization of Indian history in his book *History of British India* in the early nineteenth century. Later it became the order of the day.
- 5 The Asiatic Society was founded by Sir William Jones in Kolkata on 15 January 1784.
- 6 A popular Telugu leader and Gandhian Potti Sreeramulu had to sacrifice his life to achieve the demand for linguistic states in India. He started a fast unto death to achieve the demand for a state for the Telugu speaking people on 19 October 1952 and died amidst the fast on 16 December 1952.
- 7 The peasant uprisings under the leadership of the CPI (ML) in 1970s radicalized the rural India in a big way. By the middle of 1970s the issue of national question in India re-surfaced in the political debates and sub-national movements like that of Punjab and Assam started challenging the monolithic Indian nationalism propounded by the Indian National Congress.
- 8 In the national council of the Bhartiya Janata Party (BJP), held at Vijayavada in 1986, L.K. Advani, the President of BJP dubbed the secularism practiced by Congress as

'pseudo-secularism' and castigated it as appeasement of religious minorities. However, the term 'pseudo-secularism' was used by none other than A.B. Vajpayee for the first time in 1969.

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About the Authors

PRABHAT PATNAIK is an internationally known economist and Professor, Centre for Economic Studies and Planning, Jawaharlal Nehru University, New Delhi. Currently he is Vice-Chairman, Kerala State Planning Board.

JAMES PETRAS is a Bartle Professor (Emeritus) of Sociology at Binghamton University, New York. He is the author of more than 62 books published in 29 languages, and over 600 articles in professional journals, including the *American Sociological Review*, *British Journal of Sociology*, *Social Research*, and *Journal of Peasant Studies*.

JAYATI GHOSH is Professor, Centre for Economic Studies and Planning, School of Social Sciences, Jawaharlal Nehru University New Delhi.

S SHAJI is an Assistant Professor at Department of Political Science at University of Hyderabad, India

GIRISH KUMAR R. is Assistant Professor, School of International Relations and Politics, Mahatma Gandhi University, Kottayam, Kerala, India. He is also the Honorary Director of KN Raj Centre, Mahatma Gandhi University.

SAJAN THOMAS is an Assistant Professor of Political Science and Public Administration at St.John's College, Anchal, Kerala. Previously, he was Fredrik Barth–Sutasoma research fellow at University of Bergen, Norway and a Supra visiting scholar at the Nordic Institute of Asian Studies, Copenhagen, Denmark.

PREMANAND MISHRA is a doctoral Scholar in the School of International Studies, Jawaharlal Nehru University, New Delhi.

H. VANLALLAWTA is a doctoral scholar at the Department of Political Science, University of Hyderabad.

OOMMEN JOHN is a senior Faculty at the State Institute of Rural Development under Kerala Institute of Local Administration (KILA), Kerala.

SHERINE CHACKO is a Specialist in Social Work (RGSA), State Institute of Rural Development under Kerala Institute of Local Administration (KILA), Kerala.

MATHEW JOSEPH C. is Associate Professor, MMAJ Academy of International Studies, Jamia Millia Islamia, New Delhi.

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