Research Article

International Journal of Qualitative Methods
Volume 25: 1–9

DOI: 10.1177/16094069261429332
journals.sagepub.com/home/ijq
Sage

Rethinking Studying Up: Caste, Positionality, and Reflexivity in Fieldwork

Madhuri Kamtam[1]

Abstract

Who holds epistemic authority to study whom, and what unspoken imperatives—social, institutional, or cultural—shape our research choices? This paper interrogates the challenges of research in a caste-stratified society, where caste functions not just as an analytical focus but as a structural force configuring access, legitimacy, and researcher-participant dynamics. Drawing on eight months of fieldwork (October 2022–May 2023) as a Dalit woman from a beedi-working family in Telangana, India, it examines how caste disrupts conventional epistemic hierarchies, notably those shaped by gender and socio-economic status. Focusing on a heterogeneous group of beedi workers—spanning dominant and oppressed castes—this study reveals how caste privilege persists amid economic precarity, with dominant-caste respondents asserting authority through everyday practices. My Dalit identity shaped access and interactions, exposing the uneven terrain of fieldwork within structural inequities. Engaging Nader's (1972) call to "study up" and Priyadarshini's (2003) critique of fixed identities in studying up, I advocate a reflexive, caste-conscious methodology. Centring the epistemic and structural barriers confronting marginalised-caste scholars, this paper draws on Guru (2002) to highlight their exclusion from knowledge production and Rege (2006) to advocate standpoint epistemologies rooted in lived oppression, pressing for institutional and methodological transformation. Without these, fieldwork risks entrenching the inequities it seeks to critique, leaving caste an unreflexive blind spot in knowledge production. While caste and class intersect in shaping inequality, this paper treats caste as a historically and affectively distinct structure that fundamentally reconfigures fieldwork relations in the South Asian context.

Keywords

studying up, studying home, caste, power, knowledge production, Dalit scholars, fieldwork, marginalisation, positionality, research ethics

Received: 22 April 2025; Revised: 6 February 2026; Accepted: 11 February 2026

Introduction

Who is epistemically authorised to study whom, and under what conditions does this authority emerge? This paper critically examines the interplay of "studying up" when "studying home" within the epistemic landscape of caste, power, and knowledge production in India. In this paper, caste is approached not merely as a social hierarchy but as an *onto-epistemic structure*—one that shapes being, knowing, and the conditions under which epistemic authority is granted or withheld. Engaging Laura Nader's (1972) concept of "studying up"—a call to redirect scholarly scrutiny toward power holders—and its subsequent evolution, I probe a foundational question: Why do we investigate the phenomena we do?

[1]School of Global Development, University of East Anglia, Norwich, Norfolk, United Kingdom of Great Britain and Northern Ireland

Corresponding author:
Madhuri Kamtam, School of Global Development, University of East Anglia, Norwich Research Park, Earlham Road, Norwich, Norfolk NR4 7TJ, United Kingdom of Great Britain and Northern Ireland.
Email: m.kamtam@uea.ac.uk

Academic inquiry has long fixated on marginalised communities, yet the voices of oppressed-caste scholars remain markedly underrepresented, a disparity that not only dictates research foci but also configures the modalities of knowledge production.

This paper argues that the stakes of "studying up" in caste-stratified societies cannot be understood solely through access to elites, but must be reframed through horizontal, relational, and intersectional research practices that attend to how caste, gender, class, and institutional power converge in the field. While dominant research paradigms often celebrate reflexivity, they frequently leave intact the hierarchies that determine who is authorised to theorise and whose suffering becomes data.

Within neoliberal academia, marginality is increasingly welcomed as narrative while its structural critique is disavowed. Dalit scholars are often encouraged to "bring their experiences" into research, yet are disciplined when those experiences confront institutional casteism, question elite legitimacy, or refuse gratitude for inclusion. This mirrors colonial knowledge regimes that historically pathologised Dalit bodies as objects of study rather than recognising them as producers of theory —revealing continuity rather than rupture between colonial and contemporary academic hierarchies.

In caste-divided India, where dominant-caste scholars have historically monopolised academic spaces, caste has often been framed through an external gaze, sidelining the lived realities of oppressed-caste researchers. This paper challenges such epistemic hegemonies by advancing what I term *insurgent reflexivity*: a reflexive methodological practice rooted in marginalised caste positionality, where discomfort, refusal, and exposure become analytic resources rather than methodological failures. Drawing on my fieldwork as a Dalit[1] woman examining caste and labour among beedi workers in Telangana, conducted over eight months (October 2022–May 2023), the paper engages with a heterogeneous group of beedi[2] workers—spanning dominant and oppressed castes—revealing how caste privilege persists within economically precarious contexts. Conventional research ethics presuppose researcher privilege over participants, yet my encounters exposed a more intricate reality: dominant-caste respondents wielded authority through quotidian caste practices, upending simplistic researcher-researched hierarchies.

Caste emerged as the organising logic of fieldwork dynamics—shaping access, authority, and social relations—outweighing economic hardship as the primary determinant of power. My Dalit identity was not a passive attribute but a critical lens and inescapable praxis, mediating interactions and exposing caste as both a structural edifice and a lived experience that informs researcher positionality and epistemic production. This article thus interrogates three pivotal questions: How do caste hierarchies configure access, legitimacy, and relationality in fieldwork? What does 'studying up' entail when 'studying home' in a caste-stratified society —particularly when the researcher holds a marginalised position? How might reflexivity foster a caste-conscious methodology that disrupts rather than entrenches structural inequities?

While caste and class intersect in shaping inequality, they are not interchangeable analytic categories. Class hierarchies are largely produced through capitalist relations and are globally legible across contexts, whereas caste is a birth-ascribed system historically sedimented through colonial governance, census practices, and the legal codification of "untouchability." Its power operates not only through economic exclusion but through affective regulation, spatial segregation, and epistemic hierarchies that shape who is recognised as a legitimate knower. Attending to this distinction is crucial for understanding how fieldwork relations are structured, interpreted, and ethically negotiated in caste-stratified contexts.

Methodologically, this research embraces a reflexive stance, rooted in my dual positionality as an insider-outsider within Telangana's beedi-working communities. I argue that caste fundamentally reconfigures fieldwork dynamics in ways mainstream research ethics often elide. Drawing on Guru (2002), who critiques the epistemic exclusion of Dalit scholars, and Rege (2006), who champions standpoint epistemologies grounded in oppression, this paper contends that caste positionality demands scrutiny—particularly when the researcher's identity contests entrenched power structures. My fieldwork underscores the urgency for methodologies that confront the barriers marginalised-caste scholars face, advocating for institutional mechanisms to support those navigating caste-based obstacles. Without such epistemic and structural shifts, academic research risks reproducing the very hierarchies it seeks to dismantle.

Understanding the Caste System

Caste constitutes a rigid, birth-ascribed hierarchy that has historically delineated social status, occupational roles, and interpersonal relations in India. Anchored in the ideological binary of "purity" and "pollution," it regulates practices of commensality, physical contact, and spatial segregation. Traditionally, Indian society was stratified into four varna

1. A term referring to historically marginalised castes (Scheduled Castes Category) in India, formerly called "untouchables."
2. A traditional, hand-rolled cigarette made by wrapping approximately 0.15 to 0.25 grams of sun-dried, flaked tobacco in a dried *tendu* leaf (*Diospyros melanoxylon*), and securing it with a small thread. In contrast, a standard commercial cigarette typically contains around 1 gram of tobacco. Beedi rolling is a major source of informal employment for women in rural India, particularly from economically marginalised communities, offering home-based work despite low wages and precarious conditions.

categories: Brahmins (priests and scholars), Kshatriyas (warriors and rulers), Vaishyas (merchants and traders), and Shudras (labourers and service providers). Excluded from this schema, Dalits—designated Scheduled Castes (SCs), formerly "Untouchables"—were stigmatised as the most "polluted," consigned to occupations like manual scavenging and sanitation work. Adivasis (Scheduled Tribes, or STs) faced parallel marginalisation through geographic and social isolation. This systemic exclusion, as Ambedkar (2014)[3] argues, entrenches economic deprivation and social discrimination, a critique echoed by Teltumbde (2018) in his analysis of caste's enduring material consequences.

To mitigate these inequities, the Government of India (1950) instituted legal classifications—SCs, STs, Other Backward Classes (OBCs), and Other Castes (OCs)/General Category—underpinning affirmative action in education, employment, and political representation. OBCs encompass castes facing socio-educational disadvantage outside SC/ST categories, while OCs denote historically privileged groups. Though untouchability was constitutionally abolished (Constitution of India (1950), caste-based discrimination persists, despite protective legislation like the Scheduled Castes and Scheduled Tribes (Prevention of Atrocities) Act (1989) and the Protection of Civil Rights Act (1955). Deshpande (2003) contends that such persistence reflects caste's adaptability, morphing into subtler forms of exclusion that defy legal redress.

In contemporary India, neoliberal development discourse further obscures caste violence by reframing structural oppression as individual or cultural deficit. Narratives of "skilling," entrepreneurship, and digital literacy recode caste-based exclusion as a failure of aspiration or merit, rendering discrimination invisible within aspirational frameworks of progress. As Rege (2006), Subramanian (2019), and Teltumbde (2018) caution, such discourses echo colonial developmentalism by transforming caste into a problem of backwardness rather than power, thereby insulating dominant groups from accountability.

In Telangana, caste remains a pivotal axis of social and economic organisation. The state's classifications—Backward Classes (BCs, subdivided into BC-A, BC-B, BC-C, BC-D), SCs, STs, OCs, and socio-economically differentiated Muslim categories (BC Muslims and OC Muslims)— govern access to reservations and welfare schemes. The Socio-Economic, Educational, Employment, Political and Caste (SEEEPC)[4] Survey (2024) reports BCs as the largest group (46.25%), followed by SCs (17.43%), STs (10.45%), and OCs (13.31%), with Muslims at 12.56% (BC Muslims 10.08%, OC Muslims 2.48%) (The New Indian Express, 2025). These categories, while ostensibly administrative, reify caste as a determinant of power and opportunity.

This structural backdrop is not merely contextual but constitutive of fieldwork dynamics. As Bayly (2001) notes, caste's resilience shapes not just social relations but also epistemic authority—who studies whom and how. For a Dalit researcher like myself, engaging beedi workers across this caste spectrum reveals how such hierarchies permeate knowledge production, a theme this paper explores through reflexive practice.

Navigating Insider and Outsider Perspectives

This research is deeply personal. As an Indian national and a first-generation school-goer, young Dalit (SC, formerly 'Untouchables') woman from a lower-class background— born into a beedi- working family in a village in Telangana, my identity fundamentally shapes my approach to this work. I am not a detached observer but someone whose life is intricately interwoven with the caste-based, gendered, and economic realities I study. In North Telangana, where beedi rolling sustains many livelihoods, my mother, like countless women, laboured under exploitative conditions for meagre wages, her health often compromised. As a child, I was not merely a bystander but a participant—tying threads, sorting tobacco leaves, rolling beedis—tasks so routine I rarely questioned them. In our village, beedi work was an essential part of life, framed as a means for women to contribute economically while confined to domestic spaces, adhering to traditional gender roles. For young women, learning this skill from mothers or aunts was both a survival strategy and a cultural asset, enhancing marriage prospects. These early experiences left an indelible mark, shaping my understanding of how caste, gender, and labour converge in the daily lives of women beedi workers.

My journey into academia was ignited by a desire to critically engage with these conditions. My undergraduate exposure to the Self-Employed Women's Association (SEWA), whose advocacy illuminated the systemic neglect of informal women workers like my mother (Bhatt, 1997), inspired my first fieldwork—an undergraduate thesis on welfare schemes for Telangana's beedi workers. That project laid bare the exploitation and precarity of this labour, alongside the resilience and agency of the women sustaining it. These formative inquiries paved the way for my doctoral research which adopted a

3. The *Annihilation of Caste* was first published in May 1936. See Ambedkar (2014) for an annotated edition.
4. The SEEEPC Survey was conducted by the Government of Telangana in 2024. While the full report remains unpublished, key findings were presented in the Telangana State Legislature after approval by the state cabinet. Telangana Chief Minister Revanth Reddy introduced the caste census survey in the Legislative Assembly, and its findings have been reported by various news outlets, including The New Indian Express (2025).

feminist and caste-sensitive lens to probe the socio-economic realities of beedi workers, foregrounding the intersections of structural inequity and lived experience.

Conducting fieldwork "at home" presented a dynamic interplay of connection and distance. As a Dalit woman and daughter of a beedi worker, my identity was deeply embedded in the research process, embodying the blurred boundaries between "insider" and "outsider" that scholars like Narayan (1993) and Srinivas (2009) describe. The conventional insider-outsider dichotomy fails to capture the fluidity and context-specificity of my positionality, which shifted ceaselessly amid the evolving dynamics of the field and my relationships with participants. My identity as a Telugu-speaking woman from a rural background, with an accent and dialect closely aligned with the Telangana *yaasa*[5], fostered trust and relatability. Workers often welcomed me as "one of their own," viewing my academic achievements as a source of pride for the beedi-working community. These shared experiences granted access to conversations and spaces likely closed to outsiders. Yet, my role as an educated researcher—asking probing questions and pursuing academic inquiries—marked me as distinct, a subtle reminder of my divergence from a community where formal schooling was rare.

This closeness introduced layered complexities. As a young, unmarried, first-generation school-goer and PhD researcher, I was an anomaly, frequently facing questions like, "Why are you doing this work?" or "Why are you not married yet? When will you have kids? Why are you walking around with pen and paper like this?". These queries reflected cultural expectations around gender roles, complicating some interactions. I navigated them with patience, humour, and kindness, explaining my research and redirecting focus to their work, which built understanding and connection. However, caste dynamics—outlined in the preceding section—further shaped these encounters. My Dalit identity fostered solidarity with Dalit participants but positioned me as an outsider among dominant-caste or sub-caste beedi workers. Despite legal safeguards, the caste's social realities remain entrenched. I encountered microaggressions, exclusion, and subtle discrimination from dominant-caste respondents, underscoring caste's pervasive grip.

Choudhary's (2019) critique—that caste is not merely a structural hierarchy but a lived experience conditioning every interaction—resonates deeply with my fieldwork. Like Choudhary, whose caste identity was foregrounded by respondents, I found mine subtly but powerfully shaping social exchanges, despite the professional veneer of research. A vivid instance unfolded in Thandriyal village:

Beedi Worker (Padmashali[6], BC caste): "Wow, you've done so well! But *meerememtollu*?[7] [translated as 'who the hell are you?'] Padmashali only, no? Same caste as mine?"

This question, cloaked in praise, carried a quiet menace, probing my caste to fix me within a hierarchy and challenge my legitimacy as a Dalit scholar. It was not mere curiosity but an attempt to reassert caste boundaries, unsettled by my education and presence in an academic role.

Me: I took a deep breath and replied, "Aunty, I'm a Dalit. I belong to the Mala[8] sub-caste, part of the Scheduled Caste."

Beedi Worker: A pause ensued, followed by a soft, drawn-out "ohhhhh…," her tone shifting noticeably. Moments later, she stood abruptly, uneasy. "I… I have to go. Take care," she said, departing without offering the snacks and water she had earlier mentioned she would share.

This moment was not merely an instance of social exclusion but an enactment of caste as affective governance. The expectation was not only that I accept exclusion silently, but that I remain grateful, non-confrontational, and emotionally disciplined. Such anticipatory regulation of affect—where marginalised subjects are expected to manage discomfort to preserve social harmony—echoes both colonial modes of disciplining loyalty and neoliberal multiculturalism, where inclusion remains conditional on docility.

Such caste dynamics were stark, varying not only across groups but within sub-castes like Mala and Madiga. The sudden withdrawal or guardedness from some participants revealed the depth of caste prejudice, even among marginalised beedi workers sharing socio-economic struggles. These moments, echoing Choudhary's (2019) insights, were not mere obstacles but foundational to my inquiry, revealing caste's enduring impact on identity and interaction. Choudhary argues that respondents' foregrounding of a researcher's caste disrupts value-neutral ideals, a challenge amplified for marginalised-caste scholars who face suspicion or prejudice, as Franks (2002) notes. He deems these encounters "valuable data," exposing caste's pervasive influence—a perspective I share. For me, these experiences of rejection and discomfort were not

5. *Telangana yaasa* refers to the unique dialect and accent spoken in rural Telangana, characterised by distinct phonetic and linguistic variations from standard Telugu.
6. *Padmashali* refers to a sub-caste within the Backward Class (BC) community, traditionally associated with weaving and beedi rolling, particularly in the Telangana region. The women of this sub-caste are highly regarded for their expertise in beedi rolling and other related crafts, which are considered integral to their caste identity.
7. *Meerememtollu* (sometimes *Meerenti* or *Meerentandi* in Telugu) is less a polite inquiry than an authoritarian probe into one's caste identity, often carrying a quiet menace akin to "Who the hell are you?" It seeks to locate and confine individuals within caste hierarchies, reinforcing boundaries when difference is perceived. In this context, it subtly challenged the researcher's legitimacy as a Dalit in an academic role.
8. *Mala* is a Dalit subcaste (SC) in Telangana and Andhra Pradesh. Another major Dalit subcaste in the region is *Madiga*.

just personal but epistemic, offering critical insights into caste's resilience and its implications for knowledge production in fieldwork.

Fieldwork at 'Home': Between Familiarity and Marginality

What emerges here is not reflexivity in its conventional methodological sense, but what I describe as *insurgent reflexivity*: a counter-relational practice where discomfort, refusal, and exposure become methodological resources rather than obstacles.

This duality of familiarity and marginality mirrors broader scholarly debates on "fieldwork at home" (Narayan, 1993; Srinivas, 1960), where researchers navigate the fluid interplay of power, identity, and privilege. Nader's (1972) concept of "studying up" reveals the challenges of researching powerful elites—gaining access, wrestling with ethical dilemmas, and managing power dynamics. Nader underscores the institutional barriers and relational negotiations within elite spaces, compounded by the researcher's own identity. Priyadarshini (2003) extends this framework by highlighting how elite institutions like Indian business schools can destabilise the researcher's self-image and professional identity. She advocates for flexible identities that evolve rather than rigid ones that constrain adaptability—a methodological imperative when engaging complex social terrains.

In my fieldwork, studying "up" among dominant-caste beedi workers while rooted in my "home" community of oppressed-caste workers deeply fractured my researcher image. Unlike a dominant- caste researcher whose caste might seamlessly align with elite spaces, my Dalit identity invited scrutiny and suspicion from both academic and home communities. My reputation was not shaped solely within the professional realm, but also among a fractured community where my education and identity as a first-generation school-goer and Dalit woman marked me as an anomaly. If I had been dominant-caste, would this kind of suspicion or fractured reception have occurred at all? As mentioned earlier, a dominant-caste woman's discomfort upon learning about my background suggested that her sense of hierarchy had momentarily collapsed—perhaps because my academic position destabilised the caste order she had assumed. This fluidity unsettled conventional binaries: the "powerful" appeared momentarily threatened, and the "marginalised" seemed briefly powerful. But this power was fleeting and fragile, raising questions: did my position as a researcher confer temporary privilege? How do these moments complicate the idea of advocacy, and who gets to speak for whom?

These experiences underscore Priyadarshini's call for fluid, evolving identities in research, where rigid frames of "powerful versus powerless" fail to grasp the nuances of caste and relationality. While these power dynamics may shift momentarily, they do not erase the potential for dominant castes to consolidate power or even inflict harm. Instead, such tensions demand deeply reflexive methodologies—ones that recognise not only the social stratifications in the field, but how we, as researchers, both challenge and get caught within them. As Foucault (1997) notes, fixed identities often inhibit transformation. Fluidity, on the other hand, opens up space for critical reflection, not only about our subjects but about our own complicity and positionality within systems of caste and knowledge-making.

These insights resonate profoundly with my research as a Dalit woman studying dominant-caste groups. Priyadarshini's emphasis on flexible identities and strategic engagement aligns with my navigation of caste hierarchies, often elite in their social capital if not economic status. This approach demanded constant reflexivity, prompting questions like: How does my academic privilege shape the narratives I hear? How do my experiences as a Dalit woman both enrich and challenge my understanding of others' realities? These queries, echoing the patience, humour, and kindness I employed in earlier interactions, guided my efforts to honour the voices of beedi workers while acknowledging the boundaries and biases my identity imposed. This reflexive process deepened my grasp of fieldwork's complexities, positioning me as both participant and observer within the social realities I sought to study.

A major decision during fieldwork was whether to disclose my caste identity. Drawing on Choragudi's (2017) exploration of ethical dilemmas in caste-based research, I chose transparency, identifying as a Dalit (SC) Mala. While Choragudi navigated barriers by assuming a 'fake' caste identity to facilitate access, I chose openness—a choice that exposed me to prejudice and condescension, yet allowed for authentic, if painful, engagement with participants. This choice laid bare the entrenched hierarchies and systemic biases sustaining caste as a system of 'graded inequality' (Ambedkar, 1990). Following Choragudi's mantra— "any remark coming from them is data, however harsh or gentle it might be" (p. 392)—I reframed these emotionally charged encounters not as personal affronts but as opportunities to document caste's enduring social power.

This approach, though taxing, enriched my analysis of how caste intersects with gender and class in everyday life. Choudhary (2019) reinforces this, arguing that nuanced methodologies—integrating perspectives from below and fostering bottom-up research—are essential for inclusive knowledge production and countering structural biases. My Dalit identity became a lens to uncover the living realities of caste oppression, a standpoint epistemology (Rege, 2006) that ensured authenticity and deep engagement with inequity. By critically examining my positionality, I bridged familiarity with

marginality, aligning with Nader's (1972) call to study power and Priyadarshini's (2003) push for paying attention to fluidity of power and identity. This reflexive stance not only revealed the caste dynamics I faced but also underscored the need for methodologies that confront, rather than reproduce, the power structures shaping fieldwork at "home."

Discussion: Rethinking Research Hierarchies and Power in Caste Contexts

Read through an intersectional lens, these encounters reveal how caste operates alongside gender, class, and institutional location to produce uneven research relations. Intersectionality here is not an additive framework but a relational one, illuminating how caste intensifies vulnerability even within spaces of apparent academic authority.

These dynamics point toward what can be understood as epistemic extractivism: the incorporation of Dalit labour, pain, and perspective into institutional knowledge economies without corresponding redistribution of power, authorship, or authority —a process I encountered directly in moments where my caste identity enabled the extraction of data and insight, while foreclosing institutional support, legitimacy, or protection. Under academic capitalism, marginalised scholars are often valued when their work confirms dominant moral narratives yet disciplined when it becomes structurally confrontational or institutionally disruptive —a tension that surfaced repeatedly in how my bureaucratic encounters were framed as "procedural issues" rather than structural barriers.

This research fundamentally challenges the traditional researcher–participant paradigm, exposing its limitations in caste-structured societies like India, where power, positionality, and the intersections of caste, gender, and class shape fieldwork dynamics in unpredictable and often uncomfortable ways. Western epistemologies often frame the researcher as an authoritative figure studying marginalised communities (Smith, 2021), but my study of beedi workers revealed a far more contested and layered terrain. As a Dalit woman from a beedi-working family, my identity created a unique oscillation—enabling solidarity with oppressed-caste participants while provoking resistance, suspicion, and subtle hostility from dominant-caste participants.

But these barriers were not merely limitations; they offered a different kind of analytic power. Rather than only being hindered by caste prejudice, I was able to witness, name, and engage with it from a standpoint shaped by lived knowledge. In these brief but charged moments—like when a dominant-caste woman withdrew from an interaction upon learning my caste—I wasn't just excluded; I was also exposed to the fragility and anxiety that privilege can mask. These encounters not only disrupted the assumption of static researcher privilege but also challenged the idea that power within caste hierarchies is one-directional or neatly contained.

Caste, as Béteille (1996) reminds us, is not simply a structure of exclusion but a social grammar that shapes what is known, who is allowed to speak, and how knowledge is produced. In the field, caste distinctions mediated access, silence, and intimacy. Yet my presence—my educational capital, Dalit identity, and willingness to name caste—also unsettled dominant norms. These interactions offered not just insight into caste's endurance, but also into its moments of rupture.

Rather than simply navigating these tensions, I saw them as sites of possibility—where embodied knowledge could challenge dominant epistemologies and reimagine what research relationships could look like. In this sense, the aim was not only to study caste relations, but to intervene in how they are defined, sustained, and potentially transformed.

Yet, this study's implications stretch far beyond fieldwork, exposing the deep-rooted injustices that marginalise Dalit voices in academia and society. The suicides of Dalit students in elite institutions like IITs (Indian Institutes of Technology) and IIMs (Indian Institutes of Management) —driven by casteist exclusion and unrelenting pressure—underscore a crisis of representation and belonging (Bhoi & Gorringe, 2023; Sukumar, 2022; Thorat & Neuman, 2012). Yashica Dutt's *Coming Out as Dalit* (2024) lays bare the personal toll of caste stigma, while Suraj Yengde's *Caste Matters* (2019) critiques the systemic erasure of Dalit agency in knowledge-making spaces. This is compounded by the stark underrepresentation of SC/ST faculty in these institutions, where casteist gatekeeping—through funding disparities, mentorship gaps, and subtle biases—keeps marginalised scholars at the margins (Rathod, 2019).

These are not isolated institutional failures but symptoms of a larger epistemic violence that privileges dominant-caste narratives while silencing those best positioned to challenge them. My own fieldwork revealed how this violence operates in more everyday, bureaucratic forms. When attempting to access official records or data from local offices, I was often denied information after stating I was from the area. Once my surname and address revealed the Dalit colony I belonged to, the response from officers would shift sharply—from politeness to suspicion or outright dismissal. In one instance, a government staff member shouted at me and questioned my credibility, making it clear that someone like me—without social or cultural capital—had no place asking questions of the system. The stark spatial demarcations of caste, where everyone knows which community lives where, served to reinforce this exclusion.

Such experiences highlight how caste-based hierarchies are not just historical residues but active, everyday mechanisms of power—shaping who can speak, who can access, and who gets to research and represent. They also make clear that the struggle for epistemic justice is not only academic—it is also personal, bureaucratic, and deeply political. My own

navigation of elite academic spaces as a Dalit scholar mirrors this struggle, revealing how the root causes of inequity—caste discrimination, institutional apathy, and power monopolies—extend far beyond the field, perpetuating a casteist monopoly over legitimate knowledge.

What this paper enacts is therefore not reflexivity as self-awareness, but reflexivity as onto-epistemic reparation. By refusing silence, gratitude, and neutrality, this approach disrupts colonial and neoliberal research protocols that demand emotional compliance from marginalised scholars while extracting their knowledge (Tuck & Yang, 2012).

Reflexivity emerges as a linchpin in this rethinking, foregrounding the fluidity of insider-outsider roles in caste-based research. My Dalit identity was no static backdrop but an active force—fostering solidarity with some beedi workers while eliciting disdain from dominant-caste participants, complicating trust, data collection and knowledge production. This aligns with Nagar's (2006) call for a relational approach that embraces positionality's messiness, where caste, gender, and class produce shifting power dynamics. The emotional and ethical stakes of such fieldwork are palpable: trust and connection, vital to qualitative inquiry, become battlegrounds when filtered through caste hierarchies. Treating participants as co-producers of knowledge, rather than passive informants, revealed the lived textures of exclusion and resilience—yet caste remained a hidden transcript, subtly dictating what was shared or withheld (Omvedt, 1994). This relationality demands we reconsider Nader's (1972) provocation to "study up." For Dalit scholars, accessing elite spaces—whether beedi industry actors or academic networks—is fraught with casteist resistance (Gorringe, 2017), amplified by professional risks, lack of institutional incentives (Jodhka, 2017) and support.

Why, then, don't we study up more? The barriers are structural: institutional gatekeeping, careerist pragmatism, and funding biases favour research on marginalised groups over scrutiny of elites (Deshpande, 2003). My attempts to engage dominant-caste actors met suspicion and exclusion, reflecting how caste fortifies elite boundaries against "outsider" gazes like mine. Priyadarshini (2003) discusses her participants' reluctance to challenge power, a hesitation driven by their privilege and desire for self-preservation, which reflects a broader tendency to avoid questioning dominant structures that might threaten their position, even as they silently acknowledged them. Studying up in caste contexts thus requires more than methodological tweaks—it demands theoretical reconceptualisation that centers caste as a primary axis of power, intersectional and often invisible to those ensconced in dominance (Bourdieu, 2018; Guru & Sarukkai, 2019). Drawing on Ambedkar's (1990) radical critique and Foucault's (1980) power analytics, I propose a caste-conscious reframing of "studying up" that accounts for the researcher's vulnerability and the systemic exclusions they face. Without this reckoning, academia risks complicity in caste hegemony, valorising marginality studies while marginalising the scholars who live them—a paradox we can no longer afford to ignore.

Conclusion: Reflections and a Path Forward

This paper has journeyed through the tangled terrain of caste, power, and knowledge production, underscoring the profound ways that being a Dalit woman and first-generation scholar reshapes the acts of 'studying up' and 'studying home.' My fieldwork among Telangana's beedi workers was not a detached academic exercise but a deeply personal reckoning—rooted in the tobacco-stained hands of my childhood, the silences of casteist rejection, and the solidarities forged with those who saw me as both kin and anomaly. As a woman navigating patriarchal expectations, a Dalit confronting entrenched hierarchies, and a first-generation researcher breaching elite spaces, I embodied a paradox: simultaneously grounded in the intimacies of home and thrust into the marginality of outsiderhood. This duality revealed caste not as a static subject but as a living force—structuring who speaks, who listens, and what truths emerge. It underscored that studying up, for someone like me, is less about scaling power's heights and more about exposing its underbelly from a vantage point forged in exclusion.

Reflecting on this, the paper challenges the academy to see beyond its polished frameworks—to recognise that knowledge production in caste societies is a contested, relational act, inseparable from the researcher's body and history. My identity as a Dalit woman did not merely inform this work; it demanded a methodology that could bear the weight of lived oppression, turning personal vulnerability into epistemic strength. Studying home became an act of reclamation, intertwining my mother's labour and my own research labour as a form of resistance against caste's erasure of marginalised voices. Yet, this is not just my story—it's a mirror to the countless marginalised scholars whose contributions remain stifled by an academy that too often studies marginality without embracing those who live it.

Before marginalised scholars even enter the field, they need meaningful institutional support that recognises the unique ethical and epistemic risks they face. Yet, current research ethics frameworks often reduce ethics to procedural checklists, overlooking deeper questions about who holds the right to research, how risks are distributed, and whose safety and legitimacy are prioritised. For scholars from marginalised backgrounds, especially those confronting caste-based discrimination, these are not abstract concerns but lived realities.

We must push academic institutions to rethink ethics more expansively—beyond participant risk alone—to include the vulnerabilities of researchers themselves. This requires changes at multiple levels: mentors must be trained to recognise the structural challenges their students face and offer sensitive, context-aware guidance; ethics boards should include scholars familiar with caste, gender, and class-based power dynamics; and examiners must be made aware of how such research diverges from conventional norms. There is also a pressing need for peer networks and support systems that affirm and advocate for researchers navigating these risks.

This requires a methodological reorientation that treats equity, care, and researcher vulnerability as core methodological obligations rather than supplementary ethical concerns. Scholars like Choudhary (2019) have already highlighted these gaps, pointing to issues such as institutional apathy, the invisibilisation of researcher risk, and the pressure to conform to dominant epistemologies. It is time we took these insights seriously and made structural commitments to ethical research practice.

Looking forward, I advocate for a seismic shift toward bottom-up research that channels epistemic authority to marginalised communities—beedi workers, Dalit labourers, and marginalised women—whose lived experiences hold transformative potential. This shift demands not only the dismantling of casteist gatekeeping in universities but also the creation of infrastructures that tangibly support marginalised scholars through dedicated funding, mentorship, and institutional policies that centre their voices as producers of knowledge—not exceptions within it. Research must pivot from top-down gazes to collaborative, community-driven inquiry, ensuring that those historically silenced shape both the questions and the answers.

But such work also requires emotional navigation—an oscillation between fear and defiance, between the intimacy of fieldwork and the safety of academic distance. As Priyadharshini (2003) suggests, there is value in adopting a less adversarial, more inquisitorial posture in the field, especially when safety and vulnerability are at stake. This does not mean compromising one's politics; rather, it reflects a strategic ethics of survival—being reflexive in the field, but uncompromising in analysis. Perhaps we are braver when further from the hate, but this distance can also offer the clarity needed to challenge power structures more forcefully.

Moving forward requires more than symbolic inclusion. It demands concrete institutional commitments: redistribution of authorship and citation power; long-term, Dalit-led funding structures; decolonisation of curricula that treats Dalit thought as theory rather than testimony; and national citation equity initiatives that disrupt caste monopolies over academic legitimacy. Without such measures, calls for reflexivity and inclusion risk reproducing the very hierarchies they claim to unsettle.

For Dalit women like me—first-generation, defiant, and rooted in struggle (Paik, 2014)—this means redefining 'studying up' not just as a method but as a collective act of resistance. It means reclaiming 'studying home' as an insurgent epistemology—where "home" is both a site of belonging and betrayal, and where knowledge emerges from the tension between exclusion and engagement. Only by embracing this fluidity—between fear and power, home and away—can scholarship truly confront caste's deep roots and reimagine a more inclusive, just knowledge landscape.

Acknowledgements

I am grateful to the reviewers for their insightful comments and generous feedback on this paper.

ORCID iD

Madhuri Kamtam https://orcid.org/0009-0000-0715-7172

Funding

The author received no financial support for the research, authorship, and/or publication of this article.

Declaration of Conflicting Interests

The author declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

References

Ambedkar, B. R. (1990). *Dr. Babasaheb Ambedkar: Writings and speeches* (Vol. 7, pp. 243–247.). Government of Maharashtra.

Ambedkar, B. R. (2014). *Annihilation of caste: The annotated critical edition*. Navayana.

Bayly, S. (2001). *Caste, society and politics in India from the eighteenth century to the modern age* (Vol. 3). Cambridge University Press. https://doi.org/10.1017/chol9780521264341

Bhatt, E. (1997). SEWA as a movement. In R. Datt (Ed.), *Organising the unorganised workers* (pp. 200–215.). Vikas.

Bhoi, D., & Gorringe, H. (2023). Caste in everyday life: Experience and affect in Indian society. In *Caste in everyday life: Experience and affect in Indian society* (pp. 1–26.). Springer Nature.

Bourdieu, P. (2018). Distinction: A social critique of the judgement of taste. In *Inequality* (pp. 287–318). Routledge.

Béteille, A. (1996). Caste in contemporary India. In C. J. Fuller, ed. *Caste today* (pp. pp. 150–179.). Oxford: Oxford University Press.

Choragudi, R. (2017). The predicament of a Madiga ethnographer: Doing fieldwork in a multi-caste village in Andhra Pradesh. In *Knowing the Social World* (pp. 377–393.). Orient BlackSwan.

Choudhary, A. (2019). Researcher, field and caste encounter: Critical reflections on fieldwork. In *Education and the Public Sphere* (pp. 238–252.). Routledge.

Deshpande, S. (2003). *Contemporary India: A sociological view*. Penguin Books.

Dutt, Y. (2024). *Coming out as Dalit: A memoir of surviving India's caste system* (Updated edition). Beacon Press.

Foucault, M. (1980). In C. Gordon (Ed.), *Power/knowledge: Selected interviews and other writings, 1972–1977*. Pantheon.

Foucault, M. (1997). Sex, power, and the politics of identity. In P. Rabinow (Ed.), *Ethics: subjectivity and truth* (Vol. 1, pp. 163–173). New Press.

Franks, M. (2002). Feminisms and cross-ideological feminist social research: Standpoint, situatedness and positionality – developing cross-ideological feminist research. *Journal of International Women's Studies*, *3*(2), 38–50.

Gorringe, H. (2017). *Panthers in Parliament: Dalits, caste, and political power in South India*. Oxford University Press.

Government of India. (1950). *The Constitution of India*. Legislative Department. Constitution ofIndia | Legislative Department | India (Accessed on 20 February 2025).

Guru, G. (2002). How egalitarian are the social sciences in India?. *Economic and Political Weekly*, *37*(50), 5003–5009. http://www.jstor.org/stable/4412959

Guru, G., & Sarukkai, S. (2019). *Experience, caste, and the everyday social*. Oxford University Press.

Jodhka, S. S. (2017). *Caste in contemporary India*. Routledge India.

Nader, L. (1972). Up the anthropologist—Perspectives gained from studying up. In D. Hymes (Ed.), *Re-inventing anthropology* (pp. 284–311.). Pantheon Books.

Nagar, R. (2006). *Playing with fire: Feminist thought and activism through seven lives in India*. University of Minnesota Press.

Narayan, K. (1993). How native is a "native" anthropologist? *American Anthropologist*, *95*(3), 671–686. https://doi.org/10.1525/aa.1993.95.3.02a00070

Omvedt, G. (1994). *Dalits and the democratic revolution: Dr. Ambedkar and the Dalit movement colonial India*. Sage.

Paik, S. (2014). *Dalit women's education in modern India: Double discrimination*. Routledge.

Priyadarshini, E. (2003). Coming unstuck: Thinking otherwise about studying up. *Anthropology and Education Quarterly*, *34*(4), 420–433. https://doi.org/10.1525/aeq.2003.34.4.420

Rathod, B. (2019). Caste conflicts on campuses: Examining diversity research to transform Indian universities into inclusive learning spaces. *Journal of Social Inclusion Studies*, *5*(2), 129–146. https://doi.org/10.1177/2394481119900838

Rege, S. (2006). *Writing caste/writing gender: Reading Dalit women's testimonios*. Zubaan.

Smith, L. T. (2021). *Decolonizing methodologies: Research and indigenous peoples*. Bloomsbury Publishing.

Srinivas, M. N. (Ed.). (1960). *India's village*. Asia Publishing House.

Srinivas, M. N. (2009). In M. N. Srinivas Omnibus (Ed.), *Studying one's own culture: Some thoughts* (pp. 571–587.). Oxford University Press.

Subramanian, A. (2019). *The caste of merit: Engineering education in India*. Harvard University Press.

Sukumar, N. (2022). *Caste discrimination and exclusion in Indian universities: A critical reflection*. Routledge India.

Teltumbde, A. (2018). *Republic of caste: Thinking equality in the time of neoliberal Hindutva*. Navayana.

The New Indian Express. (2025, February 3). Telangana's caste survey reveals BCs at 56.33%; sets blueprint for data-driven governance. *The New Indian Express*. [Telangana's caste survey reveals BCs at 56.33%; sets blueprint for data-driven governance] (Accessed: 27 February 2025).

Thorat, S., & Neuman, K. S. (2012). *Blocked by caste: Economic discrimination in modern India*. Oxford University Press.

Tuck, E., & Yang, K. W. (2012). Decolonization is not a metaphor. *Decolonization: Indigeneity, Education & Society*, *1*(1), 1–40.

Yengde, S. (2019). *Caste matters*. Penguin Random House India Private Limited.