

The Reproduction of Indian Neoliberal Reforms: Competencies, National Identity, and International Norms 1991–2008

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ABSTRACT

India's economic reforms in 1991 faced considerable political opposition at the start but gained acceptance within a few years and then persisted through 2008, through a period of multiple changes of government. This continuity requires explanation. This paper highlights the essential role played by a widely believed national identity narrative. While the narrative was expressed by various speakers only in fragments, these fragments fit into a coherent plot. There was a vision of an ancient civilization containing multiple religions heading toward a destiny of revival. This storyline was accepted by both Congress and BJP leaders and was challenged only by small segments of Indian society. The narrative's account of the present projected some leading industrial sectors and social classes as a vanguard of society that would propel the nation toward a destiny of civilizational renewal. These leading sectors and classes received favorable regulatory treatment from diverse political coalitions. In this process, other sectors and strata, especially the public sector and agriculture, faced marginalization. The favorable regulation enabled the dominant coalition of leading sectors, social classes, and state institutions to sustain the growth of their competencies despite facing obstacles. Indian diplomacy also promoted international norms derived from the national identity which supported the rising competencies.

Keywords: neoliberal reforms, competencies, creative destruction, national identity narrative, international norms, social reproduction

La reproducción de las reformas neoliberales en India: competencias, identidad nacional y normas internacionales 1991–2008

RESUMEN

Las reformas económicas de la India en 1991 enfrentaron una considerable oposición política al principio, pero obtuvieron aceptación en unos pocos años y luego persistieron hasta 2008, a través de un período de múltiples cambios de gobierno. Esta continuidad requiere explicación. Este artículo destaca el papel esencial desempeñado por una narrativa de identidad nacional ampliamente creída. Si bien la narrativa fue expresada por varios oradores solo en fragmentos, estos fragmentos encajan en una trama coherente. Había una visión de una civilización antigua que contenía múltiples religiones que se dirigían hacia un destino de avivamiento. Esta historia fue aceptada tanto por el Congreso como por los líderes de BJP y solo fue desafiada por pequeños segmentos de la sociedad india. El relato narrativo del presente proyectaba a algunos sectores industriales y clases sociales líderes como una vanguardia de la sociedad que impulsaría a la nación hacia un destino de renovación civilizatoria. Estos sectores y clases líderes recibieron un trato regulatorio favorable de diversas coaliciones políticas. En este proceso, otros sectores y estratos, especialmente el sector público y la agricultura, se enfrentaron a la marginación. La regulación favorable permitió a la coalición dominante de sectores líderes, clases sociales e instituciones estatales sostener el crecimiento de sus competencias a pesar de enfrentar obstáculos. La diplomacia india también promovió normas internacionales derivadas de la identidad nacional que respaldaban las crecientes competencias.

Palabras clave: reformas neoliberales, competencias, destrucción creativa, narrativa de identidad nacional, normas internacionales, reproducción social

印度新自由主义改革的再生产：1991年至2008年 的能力、国家认同和国际规范

摘要

1991年印度经济改革初期面临了相当多的政治反对，但几年后便获得了认可，之后一直持续至2008年，期间经历了多个政府更替。这种改革的持续性值得解释。本文强调了一个被广泛认为是国家认同叙事所发挥的基本作用。尽管该叙事仅零碎地通过不同发言者进行表达，但这些零碎部分属于一个连贯的情景。曾经有一个关于古老文明的愿景，这个文明中多个宗教共同走向复兴的命运。这个故事线被国会和印度人民党（BJP）领导人所接受，仅小部分印度社会对其表示反对。叙事对当下的描述，预示着部分主导工业部门和社会阶层是社会的领导者，他们将推动这个国家走向文明复兴的命运。这些主导部门和阶层从多样化的政治联盟中获得了有利的监管待遇。在此过程中，其余部门和阶层，尤其是公共部门和农业，曾面临边缘化（的风险）。有利的监管使得主导部门、社会阶层和各州制度成为统治联盟，以在面临阻碍的情况下依然维持能力增长。印度外交也推动了源自国家认同中的国际规范，从而支持这种能力增长。

关键词：新自由主义改革，能力，创造性破坏，国家认同叙事，国际规范，社会再生产

Introduction

This article examines India's neo-liberal reforms and related issues from 1991, the year of multi-faceted crisis, through a period of economic growth and state transformation, to 2008, the year of India attending the first leaders' summit of the G-20. The year 2008 can be considered a year of transformation for both the global order and India's status on both trade

and broader matters. America's upgrading of the G-20 in 2008 following the financial crisis can be considered a step back from the unipolar world order. It was a period of India's transition from an economy and society in crisis to the world's second fastest-growing major economy.

Social reproduction processes between Indian regulatory policies, the swift but uneven rise of productive and governance capabilities, the national

identity discourse, and the negotiation of international norms and India's status within them will be examined. A neo-Schumpeterian model of economic development is shown to require a privileged coalition between the state and ascendant sectors and classes in the economy. This coalition requires legitimization from a national identity narrative. And India's quest for competitive advantage in global production networks also required favorable international norms in relation to both economic and political matters. The reforms initiated in 1991 were initially criticized harshly by many political parties. Yet, there was great continuity in India's economic policy after 1991 despite multiple changes of political leadership. The argument will be that the economic reforms were fundamentally political processes that redistributed wealth and privilege and could endure only under a new national identity narrative and newly negotiated international norms.

Among the leading explanations of the neoliberal reforms are those of Jenkins, Lloyd and Suzanne Rudolph, Kohli, Mukherjee, and Sinha. Rob Jenkins' detailed and nuanced analysis of the Indian reforms has a materialist explanation of how the reform initiative began at the central level, was not opposed successfully by state governments and opposition parties, and how even opposition-led state governments by the middle 1990s themselves embraced the logic of capitalist reforms.¹ He argues that Indian leaders were able to pursue reform only by stealth instead of explicit proclamations. Alamgir's re-

joinder was that the stealth explanation did not explain why the Indian leadership pursued reform in the first place.² I will argue that what is missing from Jenkins' analysis is the national identity narrative about India's origin and destiny, and about which segments of society would lead that journey. This narrative came to be widely believed early in the reform process, before the rising segments gained dominance, and provided guidance and national cohesion through the process. This narrative was shared across parties and drew them into the reform process as power changed hands.

Lloyd and Suzanne Rudolph explained the embrace of capitalist reforms by Chandrababu Naidu and other regional party leaders in the states by the decline of public investment from the Center and the parliamentary strength of these parties.³ I will argue Naidu also propagated elements of the new national identity narrative.

Atul Kohli argues that India's reforms were driven by a pro-business rather than a pro-market imperative, supporting established businesses more than new entrants.⁴ While this is true empirically, the argument in the neo-Schumpeterian approach here is that "pro-market" reforms based on neutrality among companies and sectors are impossible, and certainly not able to propel economic growth. Kohli's counterfactual scenario is illusory. Further, Kohli categorizes the imperative as pro-business. At points, he does recognize different fractions within business, such as between the more technocratic

and the more traditional but does not follow through on this distinction. In fact, technocratic business arose, and other businesses stagnated. Kohli's main explanation of the political ascendancy of business interests is that they contributed money to the political class.⁵ This does not explain the succession of business fractions in a process of state-sponsored creative destruction. In the early stages of reform, the ascendant business fractions are small and materially weak. And yet, they receive regulatory support from the state at the expense of established fractions. A national identity narrative emerged after crises and mandated a privileged position for certain new fractions. There is an irreducible cognitive and discursive dimension to this process absent in Kohli's account.

Rahul Mukherji's ideas-based account shows that reformist economic ideas among technocrats reached a tipping point in the late 1980s and argues this caused the subsequent reforms.⁶ In a detailed analysis of India's cell phone boom, Mukherji casts the main protagonists in the regulatory contest to be the Department of Telecommunications and the Prime Minister's Office and attributes the outcome to ideas about economic reform in the Prime Minister's Office. While these organizations certainly were the most attentive in this matter, this explanation overlooks the impact of a larger political system and a wider set of ideas in play. I will argue that the ideas that mattered were not only economic but were also about the nature of India and its journey through

history, and these other ideas circulated far beyond the state bureaucracy.

Aseema Sinha builds a sophisticated argument showing the interplay between business strategies and capabilities, reform policies, and international organizations and norms.⁷ There is substantial overlap between her argument and the one developed here. She highlights the impact of the international trade regime on the Indian reforms. She does recognize that as Indian firms engaged with global production networks, their policy advocacy shifted in a neoliberal direction. Yet, many firms and labor unions continued to oppose neoliberal reforms. I will argue that the national identity narrative guided the politics of the regulatory contest. I will build on Sinha's emphasis on the importance of international norms.

Pranab Bardhan (1984) observed of an earlier era that India had dominant proprietary classes and an autonomous state, and that the dominant classes were in conflict. The analysis here accepts those points but pays greater attention to contests of historical succession among dominant classes and to broad ideational and international causes. It attends more closely to creative destruction among these classes, to the shift of regulatory privilege based on shifts in national identity narrative, and to feedback among these processes.

The challenge here is to explain the continuity of Indian economic reforms despite four elections and three changes of the ruling coalition over the period. Tim Büthe observes that to explain a historical sequence, the ex-

planatory variables must be made endogenous by tracing causal feedback processes over time.⁸ This means the causes of the Indian reform process must be examined as part of a larger process of social reproduction. Robert Cox's widely cited theory of historical structures tells us what kinds of components of social reproduction processes we should examine.⁹ He holds that good explanation of international historical structures requires attention to the triangular interplay of material factors, ideas, and institutions. I shall examine competencies in production networks, national identity narratives, and international norms in the vertices of Cox's triangle. The constructivism employed here holds that identity narratives are socially distributed and constructed and updated by the instantiation of intersubjective rules in ongoing discourses.¹⁰ These updates can enhance or diminish the credibility of the narrative among those who have believed it. In this way, identities, as well as norms and competencies, become elements of the reproduction or breakdown of historical structures.

Summary of the Explanation

There were three major historical processes unfolding in India during 1991–2008 and there was causal feedback between them, enabling their reproduction. These three historical processes were the interplay of neoliberal reforms and rising competencies in services and export manufacturing; the revision of the national identity narrative and incremental

updates over the period; and India's renegotiation of international norms that enabled it to build its competencies and to raise its status in the international normative order.

The rise of competencies depended on the identity narrative because that narrative designated the dominant coalition of classes and state institutions that managed and nurtured the competencies as a heroic vanguard that would lead the nation to its destiny. This hagiographic narrative legitimized the regulatory privilege afforded this dominant coalition and subsequent creative destruction in the economy. The widely shared identity narrative was essential to contain the social instability generated by the process of creative destruction in the economy. The rise of competencies in India was also dependent on the international normative order since this rise entailed technology transfers, learning, and innovation based on feedback from foreign customers and suppliers. Ease of access to these foreign partners was dependent on favorable international norms.

There emerged soon after 1991 a broad national identity consensus among a supermajority of society and political class, and most political contestation occurred within the terms of this shared narrative. The credibility of the national identity narrative, particularly its hagiography of the dominant coalition, depended on the success of that coalition in building competencies and competitive advantage, and in delivering growth. The credibility of the identity narrative is also dependent on

the international normative order, in that a steady elevation of India's status in that order persuaded Indian society that it was progressing toward its destiny under the beneficence of its vanguard classes and institutions.

Indian competency-building depended on access to global markets through favorable international norms and the avoidance of unfavorable norms based on noneconomic factors. India gained status within the hierarchical international normative order due to the hard power provided by its competencies. India negotiated its status by promoting norms that were semantic components of its national identity narrative. These norms from the narrative set the priorities for India's negotiating strategy.

Theoretical Basis

In this section, the theoretical basis for the argument about the interdependence of the three historical processes is set out. It will be argued that how states nurture some competencies in production and governance, how states construct and update their national identity narratives, and how states negotiate norms with other states are deeply intertwined.

Competencies, Social Classes, and Regulatory Privilege

This article takes a Schumpeterian and neo-Schumpeterian view of productive knowledge. In this view, productive knowledge is distrib-

uted among workers and managers, is difficult and costly to communicate, and is innovated by a path-dependent process.¹¹ The significance of this view for our analysis is twofold. First, innovation occurs as firms and their employees gain adequate competencies to compete for information-rich locations in production networks. By establishing themselves in these locations, firms are able to learn new competencies. Success in this endeavor allows them to compete for more information-rich locations. The rise of competencies is thus a virtuous cycle of innovation, competitive advantage, and learning from production network partners. Failure yields a vicious cycle. Second, innovation and technology absorption are fragile processes and can be obstructed in many ways. For competencies to rise in one country, both the state and international institutions must play a fortuitous role. Such extra-economic needs of competency growth impose onerous demands on states and societies and meet international environments of varying hospitality. The requisite conditions for the growth of competencies in different countries arise unequally.

Productive knowledge will be understood here as competencies. There is an extensive literature on competencies within firms and organizations.¹² Competencies are understandings of how to perform certain tasks well and a definition of wellness for those tasks. They entail knowledge of techniques and of qualities that can be attained by alternative techniques. For example, the India software industry attained the competencies of low error rates and

high documentation in software, and of the ability to generate these qualities among members of a relatively poor society with a quarter millennium of inexperience in advanced technologies.

Part of the neo-Schumpeterian view is that production occurs in temporarily stable networks. Transactions between individuals and firms are repeated, but not indefinitely. Knowledge flows within production networks. Competency learning takes place through learning from transaction partners.¹³ Firms learn which technological qualities are most useful to transaction partners. Some locations in production networks are rich in knowledge flows; others are not.

Production networks are sites of the competition. Individuals, firms, or networks of firms can be displaced from their locations in a production network by competitors in a process of creative destruction. Maintaining a location in a production network requires competency and innovation as a competitive advantage. When a firm gains a competitive advantage in an information-rich location in a production network, a virtuous cycle ensues.

Firms are dependent on the state to define and uphold their property rights, but states are necessarily biased among firms. It is impossible for states to regulate in a manner neutral among firms and sectors. There is a global race to build economic competencies to gain an advantage in information-rich locations in global production networks. Due to their dependence on their own prior competencies and the specific competencies of partners in production

networks, innovators have limited flexibility in the face of social obstacles to production and appropriation. A variety of social practices, old regulations, and even competitors stand in the way. Innovators cannot just innovate their way around these obstacles and need the help of the state. States must adjust regulatory regimes to enable new productive activities, to secure new kinds of property rights, and to reduce transaction costs. In this process, some existing economic sectors are placed at a disadvantage. “All countries that have successfully transformed from agrarian to modern advanced economies ... have had governments that played a pro-active role in assisting individual firms in overcoming the inevitable coordination and externality problems.”¹⁴ The idealized liberal state, neutral among firms and sectors of the economy, is simply impossible in a path-dependent process where competencies rise.

Peter Evans holds “A robust and coherent state apparatus facilitates the organization of industrial capital; an organized class of industrialists facilitates a joint project of industrialization, which in turn legitimates both the state and industrialists.”¹⁵ The leading classes within some sectors gain regulatory privilege from state institutions and rise through biased creative destruction. In this way, such state institutions and classes privileged by them form a *national dominant coalition*. The members of this coalition are owners, managers, and technologists. Other classes typically benefit from the rise of the dominant coalition, but they are not thereby part of the dominant coalition.

The dominant coalition may not escape countervailing social power. There can be protected classes which do little to build competencies, which may obstruct the building of competencies, and which countervail against the dominant coalition within regulatory politics. Espen Moe, drawing on the work of Mancur Olson and Joseph Schumpeter, shows that long-term economic development requires that vested interests that emerged in one wave of creative destruction be rendered incapable of obstructing the next wave of creative destruction.¹⁶ A stratum politically empowered to protect itself can persist from an earlier wave of creative destruction. This stratum may have enough power to protect itself from being destroyed in the current wave, even as it creates little. It may have enough power to obstruct competency-building within the current wave of creative destruction.

There are also marginalized classes. These are classes whose competencies are degraded in creative destruction. Their competencies are outcompeted in markets but also deprived of appropriate regulatory protection or complementary state investments. Marginalized classes have neither the access to competencies of the dominant coalition nor the political power of protected classes. The marginalization of these classes is not a purely economic phenomenon.

Identity Narrative

A distinctive feature of the political-economic explanation here is the causal role of national

identity narratives widely believed in the populace. The cohesion and broad political direction of the state cannot be explained only by the material rationality of ontologically prior class interests. Classes require states. Classes cannot have interests without a state that commands some margin of loyalty among the populace. A sense of belonging and unity and obedience to state authority among the populace requires a shared belief in a narrative about the past, present, and future of the nation.¹⁷ For a state to be capable of social transformation, its identity narrative should command credibility in a supermajority of the populace. And this narrative must be continually updated. In updating, the basic plot might remain stable, but it might not. In the latter scenario, the benefits of a credible national identity recede.

National identities have been presented in different semantic representations in the International Relations literature. Two major themes have been identities as categories and oppositions and identities as narratives. I shall pursue the narrative representation here. Erik Ringmar argues that the narrative representation provides a better account of how agents understand time and sequence, and thus a better explanation of their actions.¹⁸ Identity narratives implicate a past, a present, and a future.¹⁹ Such a plot is *teleological*. History is understood as having a known direction; as starting in the past, arriving in the present, and progressing toward a circumscribed future. The plot has history proceeding toward a goal. The plot of a national identity

has a *heritage*—an uneven simplification of the past that traces the genesis of the nation, a *destiny* the nation can attain with right action, and a present in which there is a heroic and capable *vanguard* of social classes and state institutions, rooted in the heritage and leading the nation toward its destiny.²⁰ The specification of a vanguard consisting of leading social classes and governmental institutions is vital for the credibility of the national identity narrative. If the populace is to believe the nation can progress from heritage to destiny, it must also believe that some part of the nation is able to lead the way and can be trusted to do so. The concept of the vanguard is distinctive to the model of national identity advanced here and central to the explanation of the growth of competencies.

National identity narratives are composed of episodes described in terms of categories and rules applied to actions and actors.²¹ These categories and rules are definitions, moral beliefs, and causal beliefs which describe actions, events, and social groups and make them parts of larger stories. Within the nationalist community, the categories and rules of the identity narrative delimit the terms of legitimate political discourse on both domestic and foreign matters. The normative rules of identity narratives are of special interest here. These are rules for the moral judgment of actions and actors. National identity narratives are allegorical; they form a moral commentary on characters and their actions based on their component norms. These internal norms of the narratives will be called *allegorical norms*.

The heroes of the narrative—the vanguard, the whole national self, and foreign friends—uphold most allegorical norms while the villains violate them.

The national identity narrative is known, in summary, to the vast majority of the national populace. But it is never articulated comprehensively. Rather, the national identity narrative is expressed to mass audiences only in fragments. These fragments are small narratives with teleological plot lines. And the great majority in the nation is able to comprehend these small teleologies as components of the larger teleological narrative.

States Negotiating Norms

International norms are integral to the explanation here because states need other states to accept functionally suitable norms to nurture their competencies in global markets and also to grant them adequate prestige through normative privilege to vindicate their identity narratives. The principal focus of a state's diplomacy is the negotiation of norms with other states, whether bilaterally, in groups, or globally. States seek through norms functional benefits such as security, prosperity, and other kinds of welfare. Some international norms treat the states which subscribe to them equally, at least formally. Other norms impose different and unequal obligations upon different states. International normative orders containing unequal norms give rise to hierarchies of status among states. The normative orders negotiated by states for functional purposes give rise to hierarchies

among them.²² Subordinate states in hierarchies do agree to norms, for functional benefits, which leave them in low status. States also reject certain norms offered by others. This can give rise to persistent normative discord and to countervailing actions by discordant states with attendant functional loss.

We have seen that national identity narratives contain norms within their semantic composition. These narratives are allegories and contain allegorical norms.²³ National identity narratives define and delimit acceptable and unacceptable norms for states. If a state accepts international norms contrary to its identity narrative, the credibility of that narrative among its populace is diminished. Such discrediting can have far wider effects. State diplomacy is in this way finely directed by its national identity narrative. State diplomacy is also shaped by its productive and governance competencies as these provide the state with its hard power.

The Reproduction of Neoliberal Reforms in India 1991–2008

The argument below is that the triangular process of social reproduction identified in the theory above is observable in India during 1991–2008. There was a sharp rise of competencies and production in the service sector and some segments of export manufacturing in this period. There was also a rise of a new, more socially diverse political class. There also remained from the previous era a demographically small but protected

class of unionized industrial workers. This class was successful in preventing the adoption of capitalistic labor laws. The existing laws obstructed the rise of broader manufacturing competencies. The agricultural classes were marginalized in this era. Agricultural production, particularly foodgrains, stagnated and public investment in agriculture did too.²⁴ The learning process of the competencies that did ascend was made possible by a dominant coalition of entrepreneurs, managers, and technical professionals, of state institutions that regulated them, and of some government institutions.

The privileges awarded to the dominant coalition were legitimized by the national identity narrative and its updates. The dominant coalition was projected as an educated and honest vanguard that was imbued with the heritage of an ancient and tolerant civilization and that would lead the nation to its destiny of civilizational restoration. This teleological storyline in the national identity narrative gave enduring political protection to the dominant coalition despite numerous political criticisms of the reforms, changes of government, and poor welfare outcomes.²⁵ The trade union movement was able to block critical labor law reforms of the kind that spurred industrialization in China and other countries. This obstruction was enabled by the credible roots in the national heritage of the very small industrial working class. The learning of competencies was also enabled by India's rising status in the international normative structure. Bilateral Indo-U.S. norms about the trade

in services were critical for the software boom. The United States had to give regulatory permission for the flow of Indian engineers to the United States to work for both Indian and American companies for Indian learning in software competencies to persist. India's civilizational identity imposed on its diplomacy the allegorical norm of strategic autonomy, including in the nuclear realm. The limitation of anti-India nuclear sanctions, and then the nuclear deal enabled the growth of economic competencies despite India's pursuit of nuclear weapons.

The rise of the aforementioned competencies relied on the Indian national identity narrative in two ways. The competencies required domestic regulatory favor enabled by the vanguard status afforded the dominant coalition. And these competencies relied on internationally negotiated norms for access to critical markets. The national identity narrative directed India's negotiating posture toward those norms.

This triangular process of feedback and reproduction between a revised Indian identity narrative, neoliberal reforms supporting new competencies, and new diplomacy toward international norms is outlined graphically in Figure 1.

Competencies, Social Classes, and Regulatory Privilege

The period after 1991 saw the rise of a professional class occupying technical and managerial positions in both public sector and pri-

vate companies, eclipsing the business families as well as the class of generalist bureaucrats who had commanded the public sector.²⁶ The fastest-growing sector in this period was business services, both in the domestic economy²⁷ and exports.²⁸ Also, fast-growing was communications, banking, community services such as education and healthcare, and hotels and restaurants. The retail and wholesale sector grew as well and was the largest of the service sectors.²⁹ Among manufacturing exports, engineering goods formed the fastest-growing major sector. The manufacturing sector as a whole had been rising as a share of GDP before 1991 but stagnated afterward.³⁰

After 1991, the college-educated professional class emerged as an influential component of the dominant coalition. There was a powerful expatriate wing of the professional class. The software boom, both among Indian migrants in America and within India, although minor in terms of employment and output, radically altered the perception of what was possible in India. Within the private sector industry, the professional class led a "silent revolution" within the private corporate sector, which had previously been dominated by business families.³¹ It was the managerial and technical competencies of this class that enabled the liberalization of 1991 to increase the growth rate in the services sector. This accumulation of competencies was enabled by focused regulatory reforms oriented toward the intensification of competition. Reforms in the services sector also aided the manufacturing sector.³²

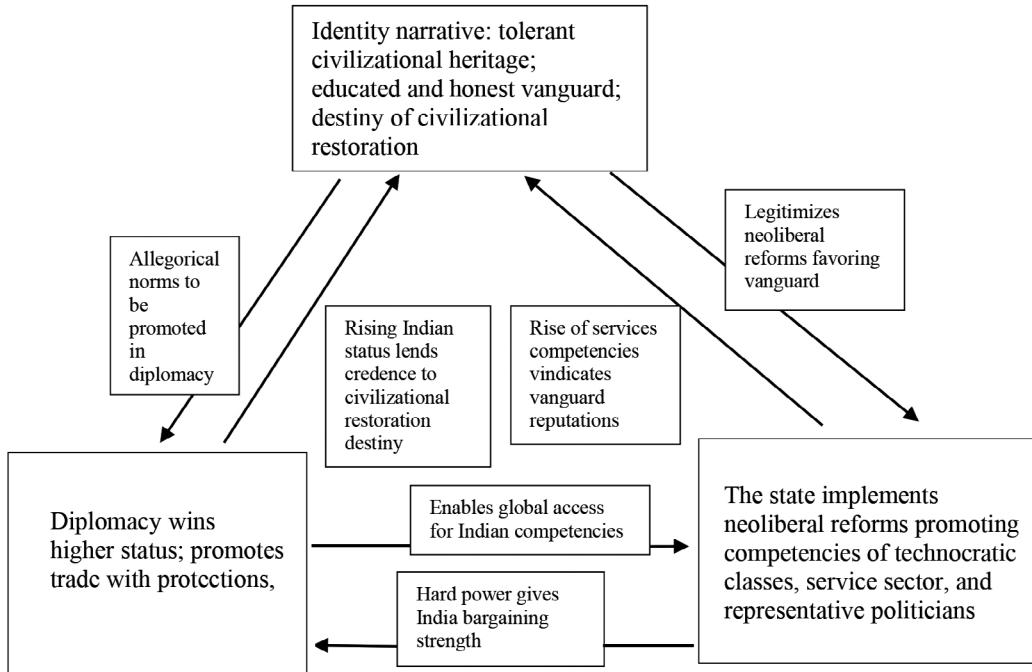


Figure 1: The Reproduction of Neoliberal Reforms in India 1991–2008

In the software sector, the professional class rapidly gained competencies in quality and sophistication, emerging as India's most globally competitive sector.³³ There was vital learning from customers in the Indian software industry. For example, Tata Consultancy Services built its quality standards in the 1990s through joint projects with Hewlett-Packard and U.S.-West.³⁴ The government had liberalized laws covering this industry starting in the 1970s.³⁵ The software industry was downstream in the production network from academic and commercial institutes. These grew rapidly to keep up with the demand for technical skills. The National Institute of Information Technology was of special importance. It pioneered pedagog-

ical and recruiting competencies. Over 35% of its students were women.³⁶

In telecommunications, India, like the rest of the world, underwent the cell phone revolution. There was a transfer of regulatory power from the ministerial bureaucracy to a market-oriented regulatory board through repeated interventions by successive Prime Ministers.³⁷ In the engineering goods sector, the technological level was modest. India's lower cost of labor was a major advantage. State assistance largely took the form of compensating the exporters for taxation and tariff costs.³⁸

The industrial working class survived the reform era as a protected class. Industrial trade unions, who form

a small portion of the labor force in India, strongly opposed reforms to create more capitalistic labor markets, with ease of labor dismissal.³⁹ Their efforts were highly effective. Prime Minister Vajpayee clearly articulated a justification for such reforms to the Indian Labor Conference but did not follow through.⁴⁰ This shows that unionized industrial labor was a protected class, politically immunized to creative destruction.

The marginalized segments of society were the peasantry and the agricultural sector. Agricultural growth slowed from the 1980s, especially in foodgrains. Public investment in agriculture slowed.⁴¹ The stagnation in incomes for half of society led to a stagnation of social welfare indicators.

There were important new competencies in governance. These were in a new political class more closely representatives of castes and regions, strengthened nonpolitical institutions like the courts and Election Commission. The breakdown of Congress Party dominance after 1989 yielded a more decentralized and socially diverse class of political and ethnic identity entrepreneurs. Regional parties and parties with middle caste and Dalit leadership gained strength, leading to the rise of coalition governments. This class has competence in articulating and projecting caste, religious, and other identities, raising funds for their parties through legal and illegal means, and in building coalitions across social identities in the highly fragmented and traditionally hierarchical society. This rise of new po-

litical leadership led to a sociopolitical transformation, especially at the state level.⁴² These new sociopolitical forces were critical to the legitimacy of the neoliberal reforms for as they themselves embraced these policies when in power, their supporters became less suspicious of the reforms.

Indian National Identity Narrative 1991–2008

The Indian national identity narrative of this period had as its heritage an ancient civilization that was open to absorbing new elements. Muslim culture particularly was cast as a major element absorbed into the larger ancient civilization. This civilization is held to have had a glorious run until colonization by the British and was now in a period of recovery. Its destiny was to emerge again as one of the world's great civilizations. It was not projected to merge into Western civilization. In particular, the Indian national identity narrative did not regard the European Enlightenment as the fount of values for India. Rather, the identity discourse, following Gandhi, held that the ancient civilization itself contained adequate values to guide the nation into the future. The journey from the inheritance of the past to destiny was to be made possible by a vanguard consisting of the honest and brilliant professional class, politicians who represented diverse social identities, and state institutions that preserved fair politics. The credibility of the narrative as a whole depended critically on the reputations across society of the social strata and

state institutions cast in the vanguard roles. I will show that this narrative did retain a margin of credibility among a national supermajority due to the ascendance of economic and governance competencies shepherded by the vanguard and due to India's rising status in the international normative order.

The evidence for the existence of the identity narrative is drawn mainly from the statements of the three full-term Prime Ministers of the period, hailing from Congress and BJP, the two largest parties and the main rivals in Indian politics of the period. The Prime Ministers' statements received wide attention. Concepts repeated by Prime Ministers of the main rival parties formed the national consensus. The Prime Ministers expressed the national identity only in fragments. But over their tenures, each had occasion to articulate all the semantic elements of the national identity theorized here. The Congress–BJP rivalry, at least while Vajpayee led the BJP, took place within a shared national identity. This identity narrative was challenged by politically marginal forces, such as more radical elements within the BJP and by separatist movements. However, a supermajority of Indian society did subscribe to it.

Most of the successful regional parties also subscribed to the consensus national identity. Chandrababu Naidu propagated icons the software and technology—components of the vanguard—with great enthusiasm in the course of his capitalist reforms in Andhra Pradesh.⁴³ He highlighted his own use of computers and used com-

puter-related slogans and term in his rhetoric. Marxists in West Bengal did not propagate the national identity narrative in their public rhetoric; however, even they did accept the role of the corporate sector—led by the national vanguard class—in their economic reforms for the state.⁴⁴

Vanguard Reputations

The post-1991 vanguard can be described as a technocratic class, both professional and entrepreneurial. They were considered honest, diligent, and nonexploitative. An exemplar of this class was Manmohan Singh. He was an economist by training. He suffered intense political criticism as Finance Minister and Prime Minister, but his personal integrity was never questioned by rivals in the political class.

The day after being sworn in as Prime Minister in 1991, Narasimha Rao said in a televised address “The government is committed to removing the cobwebs that come in the way of rapid industrialization. We will work towards making India internationally competitive, taking full advantage of modern science and technology and opportunities offered by the evolving global economy”⁴⁵ Export orientation had been developing under Rajiv Gandhi in the 1980s, but this was a critical statement of priorities for a nation in the midst of a crisis with economic and other dimensions. This statement laid the foundations for a redistribution of regulatory privilege among institutions, organizations, and social classes.

Stanley Kochanek traces the rising reputations and influence of professionally managed companies and the declining reputation in government circles of the older family-owned business conglomerates.⁴⁶ The professionally managed companies formed the Confederation of Indian Industry (CII) as a business association, while the family-owned houses stayed with the established Federation of Indian Chambers of Commerce and Industry (FICCI). The influence of CII in government increased after 1991. The 1993–1994 budget was substantially influenced by CII. Indeed the Revenue Secretary of the Finance Ministry called it “the Tarun Das budget,” after the head of CII.⁴⁷ In 2005, Tarun Das published a book on the Indian economy and Prime Minister Manmohan Singh wrote the preface.

The software industry attained the strongest vanguard reputations of any sector of the economy. The entrepreneurial pioneers, like Narayana Murthy, Nandan Nilekani, and Azim Premji became admired personalities and attracted little criticism, even from the left. Their international acclaim, such as in Thomas Friedman’s book *The World Is Flat*, reverberated back in India. These were the first Indian entrepreneurs to gain global recognition, literally in centuries. In 2009, Nilekani was appointed by the Prime Minister to a cabinet rank position as the head of the Unique ID project, an electronic system to identify every citizen for receipt of government benefits and the recording of transactions. The rise of the software industry lent credence at home and abroad to ambitious concep-

tions of Indian destiny in the national identity narrative.

The nonpolitical government institutions gained strong vanguard reputations. Chief Election Commissioner T. N. Seshan came to be regarded as a “hero” among voters across the political spectrum.⁴⁸ Rudolph and Rudolph observed

Amid this atmosphere of public disillusionment and hunger for integrity, the symbolic and practical words and deeds of the Supreme Court, the president, and the Election Commission have taken on a new significance. These institutions, despite weaknesses of their own, are now the repositories of middle-class hopes and aspirations for steady, transparent, and honest government.⁴⁹

The political class also gained strong vanguard reputations. No one admired the political class as a whole. But each substantial political party gained a loyal core following and was able to attract secondary supporters. New social identities were asserted and were credibly represented by political parties. The vast majority of the population believed their interests were being promoted by some political party and leader. Historically disadvantaged strata, particularly Dalits, saw parties projecting their identities rule states. The vanguard reputations of the political parties reinforced the legitimacy of the political system as a whole. Voter turnout remained above 60% in four of five national elections in this period, and when surveys asked

whether the nation would be better off without political parties and legislative assemblies, supermajorities answered in the negative.⁵⁰

Heritage

India, in its prevailing discourse, understood itself as a whole and ancient civilization with a continuous existence, persisting through many kingdoms and empires, and separate from and ultimately coequal to the other major civilizations. In the late colonial era, this meant the derivation of values, such as tolerance, from ancient Indian philosophy and not European Enlightenment thinkers. Vivekananda was the prime example. Gandhi continued this discourse through the independence movement. The independent state's identity discourse continued in this vein.⁵¹ The Indian national narrative did not construct India as "modern," as having recently discovered the values of the European Enlightenment. The Indian narrative from Nehru onward did embrace modern Western values such as science, bureaucracy, and democracy. But the narrative memory placed values such as religious and political tolerance in the ancient Indian past. This belief laid the logical foundation for a destiny of civilizational autonomy, as we shall see below.

Both Prime Ministers Rao and Vajpayee highlighted India's ancient civilization and the roots of secularism in that ancient civilization. Rao said to the National Integration Council in 1991 "since the dawn of history, Indian society has been characterized by a spir-

it of tolerance which is perhaps unique in the world," and this "has given India a rich civilization of remarkable cultural diversity that we can be proud of."⁵² Vajpayee invoked the theme of unity in diversity and indeed equated Hindutva with "diversity of faiths."⁵³ In his Independence Day speech in 2002, Vajpayee said, condemning terrorist attacks, that Kashmir "is a test case of *Sarva Dharma Samabhava*—secularism."⁵⁴ That phrase, meaning all faiths lead to the same end, was popularized by Gandhi and emerged as a primary expression of Indian secularism in the twentieth century. It expresses an Indic concept of secularism. Both Rao and Vajpayee drew the distinction between a broad Indian and even Hindu civilization and specific faiths, particularly Islam and Hinduism, and considered the civilization to be inclusive of these faiths. This can be understood in contrast to Jinnah's position that Islam and Hinduism were both much broader than religious faiths and no common civilization encompassed them.

Heritage constructs should not be understood only as soothing myths to be proclaimed on ceremonial occasions. Rather they are shared myths of origin that are necessary for the resolution of political crises. The riots in the winter of 1992–1993, following the destruction of the Babri Mosque in Ayodhya, presented a severe crisis at a delicate stage of the economic reforms.

For Narasimha Rao, it was vital to restore peace and return to the economic agenda. A portion of his statement in the Rajya Sabha on March 11, 1993, nar-

rated the historical moment in terms of the larger national identity narrative.

Countries which are one-tenth or one-twentieth our size, look at them, what have they done in the last ten years. They were much behind us and they are miles and miles ahead of us today. Therefore, there is something wrong in this country, in such a great country. Hindu extremism—is it not a contradiction in terms? Who could ever call Hinduism extreme? If it were extreme it would never have remained so far, it would have been dead long ago. For thousands of years it has remained merely because it is not extremist, it is all-inclusive. So, what we are doing today is to disfigure the face of Hinduism in its pristine glory, in its pristine form which hundreds of saints have built up in this country and abroad.⁵⁵

This statement is significant because of its words and ideas in combination with the circumstances in which it was said. Rao invokes two main themes from the national identity narrative on this occasion. He defines the present as a moment of international competition in which India has fallen behind. And he invokes a heritage in which the essence of Hinduism is all-inclusiveness and extremism is an aberration. He tells a simplified story of origin in which hundreds of saints built an all-inclusive Hinduism which enabled it to survive for thousands of years. This rhetoric was not cheap talk. It was cheap to utter

the talk but very costly to his agenda if he failed to persuade an adequate portion of the nation and the political class.

As the years wore on after 1991, the economic reforms and their economic and ultimately political success became a part of the heritage in the updated national identity narrative. While the reforms were much maligned in the early years, criticisms of the capitalist direction faded after a few years, and the storyline of wise capitalist reforms gained credibility with a supermajority. Manmohan Singh, as Prime Minister, arguing in 2006 in the Rajya Sabha for the nuclear deal he had negotiated with the United States, said of the economic reforms of 1991 “I was criticized by the Right, by the Left, names were used, epithets, fifteen years down, who will today say that what I did then was wrong.”⁵⁶ Singh was primarily arguing for his own wisdom and trustworthiness in regard to the nuclear deal, but his foreground argument was based on the background claim that the economic reforms were a success. It is in the background claim that the updated heritage is expressed.

Destiny

As Prime Ministers, Narasimha Rao and Vajpayee both projected destinies of economic rise and peacefulness. Both implicitly sought to maintain India’s civilizational solitude. Neither spoke of an Indian destiny of closeness with any other part of the world. Other elements of destiny circulated in media and elite discourse. Parity with China,⁵⁷ superiority of status over Pakistan, and recognition by the West

as a coequal subject of security norms, such as anti-terrorism and nuclear security, became widespread desiderata in Indian political discourse. India strove to overcome unfavorable great power norms. After the 1998 nuclear tests, Jaswant Singh criticized the nonproliferation regime as “nuclear apartheid.”⁵⁸

The rise of a globally competitive competence in advanced technology, exemplified by the success of Indian-educated migrants in Silicon Valley, for the first time since the pre-colonial era deeply altered conceptions of India’s place in the world economy and in world society. Finance Minister P. Chidambaram, serving a coalition government, articulated a conception of national destiny in his widely acclaimed budget speech in 1997. “If there is one science that will dominate the 21st century, it is information technology. If there is one industry in which India can emerge as a world leader, it is information technology.”⁵⁹

Manmohan Singh as Prime Minister continued his predecessors’ storyline of civilizational solitude in India’s destiny. In a statement to the Lok Sabha in 2007 on the nuclear deal with the United States, Singh was careful to articulate the arms-length relationship that would be maintained with the United States, despite a substantial political convergence that had taken place. He said, “in concluding this Agreement, we have ensured that the autonomy of our strategic program is fully maintained, and that Dr. Homi Bhabha’s long-term vision remains our guiding principle.”⁶⁰ Homi Bhabha had in the 1960s envisioned that there would be indefinite national technological autonomy, in

both the military and civilian sectors, in nuclear technology. The nuclear deal with America remained controversial in Indian politics through 2008, but the desirability of strategic autonomy was a matter of consensus. Singh’s statement on that day was a lengthy argument about how the deal did preserve Indian nuclear and strategic autonomy. In the political debates on the nuclear deal, and before on opening the economy, the principal dichotomy of futures was between civilizational solitude and subordination to the West. This dichotomy was never challenged by advocates of economic reform or the nuclear deal.

Allegorical Norms in Indian Diplomacy

The period after 1991 saw the end of the Cold War and the emergence of U.S.-led unipolarity. India adapted to this new order through a new national identity narrative. This narrative and its allegorical norms set new priorities in India’s diplomacy regarding international norms at the multilateral, group, and bilateral levels. India’s challenge was to maintain good access to Western markets in a unipolar era while preserving autonomy in the security realm and while falling behind China in the economic race. India established new normative agreements at the bilateral level with the unipolar power, the United States, and participated in new multilateral norms and institutions. These normative agreements raised India’s status, acknowledging prerogatives not acknowledged before. As India’s status rose, this trend was incorporated into the national identity narrative.

India's economic and competency rise was a major factor in the nuclear deal—a new set of bilateral and then multilateral norms. President Bush justified the deal that way in a press conference in India in 2006 about promoting the Indo-American nuclear deal in the U.S. Congress “now our relationship is changing dramatically. People in United States have got to understand that trade with India is in our interests.” He also spoke of “Indian Americans making important contributions to our country,” for who more H1B visas were being given.⁶¹ He was positioning the nuclear deal within the burgeoning economic and social relationship of the two countries.

Priya Chacko highlights the ways in which the emergence of a domestic power bloc of leading social classes and state institutions redefined India's geo-economic interests after 1991 and guided its diplomacy at the bilateral and multilateral levels.⁶² India had earlier rejected the East Asian model of development reliant on human resources but had now come to embrace it. And diplomacy was now guided by that model. In the negotiations on the General Agreement on Trade in Services India supported the norms of special treatment afforded to developing countries but also freer access to developed country markets.⁶³ This reflected India's new competencies in the software trade and the new vanguard in its identity narrative. India negotiated on behalf of its textile industry in the WTO, but domestic factors kept this industry stagnant, and outside the vanguard in the identity narrative.

India's understanding of one international norm changed drastically in the 1990s, and that was the intellectual property regime.⁶⁴ India moved from narrating itself as a recovering victim of Western exploitation, still vulnerable to the West's technological superiority, to a competitor, if a laggard one, in a worldwide technology race. Further, Indians started recognizing that the West was not the only other competitor in that race. This updating of the narrative implied that intellectual property was no longer a tool of exploitation but rather an instrument of progress.

India did negotiate for protection of its agriculture from imports, particularly subsidized imports. It also negotiated for the recognition for geographic indications.⁶⁵ But these delivered modest benefits to the otherwise marginalized agricultural sector.

India's geopolitical diplomacy during 1991–2008 goes through three phases. There is a defensive phase until 1998, with an effort to minimize criticism by greater powers. There an assertion against the prevailing normative order phase from then until 2000, with a willingness to withstand opprobrium from greater powers. The assertion phase strengthened India's bargaining position for the third phase—the gain of higher international status as conferred by the United States and other great powers.⁶⁶ In the process of renegotiating its status, India was able to win American assent a new construction of international nuclear responsibility. The term had previously been rooted in a Eurocentric discourse of modernity,

but India introduced its own construction of responsibility rooted in “civilizational exceptionalism.”⁶⁷

An important norm of Indian multilateral diplomacy was that of multipolarity in the world order. India joined a trilateral grouping with Russia and China, and later the BRICS institution emerged. The G-20 grouping also reflected a limited acceptance of multipolarity by the West itself. Amrita Narlikar shows that India was not bandwagoning with established powers despite the nuclear deal with America and other bilateral agreements with it.⁶⁸ This norm of multipolarity clearly reflected the Indian national identity of civilizational solitude.

Conclusion and Future Research

This article shows that the continuity of Indian reforms was made possible by social reproduction involving three major historical processes. It follows the format of good historical explanation set out by Buthe and Cox. It regards national identity not as a fixed object but as a historical process of updating in which the succession of events incorporated into the identity can strengthen or weaken its credibility among the populace of the nation. It regards the rise of productive competencies as a path-dependent process of learning in production networks in need of a margin of state regulatory protection. It recognizes that competency learning can be obstructed by protected strata inherited from the past. And it regards the ne-

gotiation of norms by the protagonist state as a process. The article specifies how these three processes shape each other. It highlights the necessity of a national identity narrative for capitalist economic development. A national identity consensus is the centripetal force counteracting the centrifugal forces of creative destruction due to competency-based competition.

India is shown to have hosted a process of competency learning in services, export manufacturing, and certain areas of governance. These were made possible by favorable regulation by state institutions. And this regulatory bias, necessary for the competency learning, was legitimized by a national identity narrative that maintains a plot structure of heritage, vanguard, and destiny. The progress in competency learning vindicated the vanguard reputations of the strata that nurtured the ascendant competencies. At the same time, the continued political strength of the small industrial working class, with its reputational roots in the heritage, was adequate to protect this class from capitalistic labor law reforms that would have been necessary to promote broad manufacturing competencies. And it is shown that India’s normative diplomacy focused on the promotion of international norms derivative of the allegorical norms in its identity narrative. And these promoted norms served the process of competency learning, through global markets and the limitation of foreign obstruction of security competencies.

The findings of this article cannot be extrapolated in a linear fashion

to the period after 2008. Nonetheless, it offers a family of concepts through which the more recent period can be understood. Some key research questions can be formed through the application of these concepts. The earlier consensus between the leaders of Congress and BJP about the national identity narrative has clearly broken down in the Modi era. The BJP has made significant changes in its construction of Indian heritage, casting aside some aspects of Muslim rule. The city of Allahabad, an ancient Hindu pilgrimage site, has been given again its pre-Mughal name, Prayagraj. This conveys clear disapproval of the Mughal decision to change its name. Yet, the Mughal's seat of Red Fort remains the primary icon of state pageantry. There has been a sharp rise in Hindutva themes in culture, media, and ideological discourse in civil society. An empirical examination of the more Hindutva-influenced storyline of the national heritage is called for.

The Congress and other anti-BJP parties have opposed the BJP narrative, yet have not articulated their own account of the Indian heritage with any clarity in the Modi era. This grand silence needs research. It is a major political weakness of the secularist coalition. This topic is difficult to research as it is the examination of something that has not happened. Yet, the disagreements and tensions within the secularist coalition can be studied.

The reputations of the economic vanguard were diluted after 2014. The acceleration of economic growth hoped

for in 2014 did not happen. Merchandise and service exports, the backbone of earlier growth, slowed sharply. However, infrastructure growth accelerated. Populist criticism of business from Congress intensified through the 2019 election. An examination of economic vanguard reputations in the Modi era is in order. The political class had emerged as a composite vanguard earlier; all major sections of society supported some part of it. Before 2014, the political class had gained in social diversity and representativeness, except for the minimal presence of Muslims. Afterward, the hard dynastic turn in Congress through the 2019 elections reversed the trend toward social diversity in the political class. The composite vanguard reputation of the Modi-era political class must be examined to see if the broad legitimacy attained earlier receded.

It is clear that the storyline of civilizational solitude in both the heritage and destiny components of the identity narrative has persisted into the Modi era. Indeed, the addition of Hindutva themes has only intensified the imagery of a cohesive Indic past and the marking as alien both Western culture and the Central Asian Islamic culture from which Muslim invasions of India originated. The recent processes of vindication in Indian society of this storyline merits examination. Which events, discourses, and trends persuaded most Indians that there was indeed a cohesive and distinct Indic civilization in the historical past and that India is destined to remain such in the future?

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