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Caste or qualification? Chaitanya Vaishnava Discussions about Brahmanas in Colonial India[1]

Abstract: *Despite the general conviction about functioning of caste system in India we are far from understanding even its basic units, called varna and jati. If many scholars are not able to provide convincing solutions to problems with definition of caste and subcaste in India, it is necessary to anlayse the whole framework of thinking within which our modern discussions about caste developed. The general hypothesis of this article can be summarized in the following way: Discussions about caste system in India are constrained by Christian theological legacy within earlier Orientalist research. Nature of several problems we encounter in caste studies is discussed in the first part, before author develops critique of the dominant interpretation for rise of bhakti movements in Indian history. Although they are often described as protest against "caste system" in general and "brahmanical orthodoxy" in particular, relevant historical evidence shows very different picture. Chaitanya Vaishnava movement, very influential bhakti tradition during the British Raj, is a chosen example for analyses. Its resources provide us with domestic ideas and practices that are challenging dominant interpretations of both caste system and the rise and nature of bhakti movements themselves.*

Key words: *caste system – religion in South Asia – varna – sramanas – bhakti – Chaitanya Vaishnavas – comparative science of cultures*

I f anything became a part of common sense knowledge about India in Europe, it is notion of the hierarchical order of society called caste system. It is described as one of the main factors that have formed history of South Asian people since the Vedic period till today. Let us remind ourselves of the role caste system has played in the explanations of major characteristics of Indian people and crucial events in their history:

Karl Marx and Max Weber considered it to be the main cause of stagnancy of Indian societies and their economy over centuries. Christian missionaries, liberal thinkers and reformers of India accused the caste system of the oppression, injustice and moral degeneration of Indian people. It is supposed to cause intellectual ills, too. For example, Louis Dumont argued that the early fixation of caste system prevented the development of historical consciousness in India. Among philosophers it is not uncommon to hear an idea that because of the caste system, there could have been hardly a tradition of open disputations in Ancient and Medieval India. Hence rational reasoning simply did not develop in domestic Indian traditions, comparable to our European philosophical development. These and similar ideas became so widely accepted that only few scholars raised questions about their plausibility. This itself is rather strange situation for researchers in history, society and religion of South Asia. Why?

The answer is simple: We are far from the clear understanding of caste as a form of social organization. Even a random reading of historical, anthropological, sociological and other works on South Asian society reveals unsatisfactory situation. There is not a clear understanding what is caste, what is sub-caste, and how these are related to Indian categories *varna*[2] and *jati*; nor what the relationship between *varna* and *jati* is. These problems were puzzling for the British colonial administrators and for their Indian respondents during the censuses and surveys,[3] and they remain unresolved today. When we look at the discussions from the first half of the nineteenth century till the first half of the twentieth century, we see several attempts to find answers. Interestingly enough, their authors admitted that they were far from satisfactory explanations to the disturbing questions.[4] Several other problems have been waiting for good solutions, for example question concerning changes in the nature of caste system: Is today's caste system in India a direct continuation from the ancient times? Or do we better understand it as a result of British colonial rule, as Nicholas Dirks and others argued?[5]

In this article, I will aim at three closely connected goals: First, let us find out what problems we face when scholars cannot agree on meaning of such basic categories as *varna*, caste, etc. All these problems are not only theoretical. They have played a crucial role in heated discussions about a proper way how to prevent "caste discrimination" today. Last year I had a chance to see, how all these long unresolved problems of Oriental studies effected life of Hindu community in the Great Britain today. In the first part

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2   I will use a simplified system of transcription for Sanskrit and other Indian terms in this article.
3   Nicholas B. DIRKS, *Castes of Mind*, Representations 37, 1992, p. 68.
4   Alexander E. H. BLUNT, *The Caste System of Northern India. With special reference to the United Provinces of Agra and Oudh*, London 1931, pp. 6–7.
5   Nicholas B. DIRKS, *Castes of Mind. Colonialism and the Making of Modern India*, Princeton 2011.

of this article, I will briefly point to the problems that both the proponents of anti-caste legislation in Britain today and many European scholars of yesterday share. If our definitions of caste and sub-caste are not satisfactory, how to proceed? I propose that we should start to analyze experts' groping for explanations of categories such as *varna* and *jati* by looking into the development of conceptual framework which Europeans have used for descriptions of society in India. In this case, as well as in other main arguments, I am following the insights of research program conceived by S. N. Balagangadhara.

Therefore, as a second step, it will be necessary to summarize and critique some of the arguments prevailing in the area of caste studies. Dominant understanding of caste today has emerged during a specific interaction between two very different cultures: European and Indian. It is necessary to understand which kind of thinking produced the problems we face. Following the insights of S. N. Balagangadhara and other researchers inspired by his work, we should ask: How did European scholars come to understanding of Indian society as hierarchical arrangement of castes? It is possible to show that these interpretations are direct continuation of old European theological debates. The story of Indian religion, its decay in the hands of priests, and hence repeated raise of reformation movements against the priesthood has been the skeleton of the theological interpretations.[6] Within this framework European scholars started to interpret different groups in India as castes and sub-castes. These groups were supposed to form a hierarchical order in society that was sanctioned and perpetuated by religious Hindu law. There were also other strings in this composite story, such as linguistic and racial speculations of the eighteenth and nineteenth centuries Orientalists that created a theory of Aryan invasion to India.

Only after these two steps I can proceed to a particular problem of the dominant explanation, namely idea that ascetic and *bhakti* traditions have been a kind of anti-caste, egalitarian movements in Indian history. Many centuries in India have been portrayed as on-going struggle of lower casts against brahmanical rule, or "despotism", which was soon translated into "tyranny of caste". What evidence do we have to support this view? I will argue that hardly any convincing evidence is available to us, and that quite some scholars who held the idea of anti-caste movements have been aware of this fact. What we have in the records from several centuries leads to a very different interpretation. Of course, I am not able to examine all the research about even majority of different *bhakti* movements in India. But we can choose one of the very influential traditions as a testing case. For this purpose, I chose Chaitanya Vaishnava movement, one of the

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6   For succinct overview of the role Chrisitian thinking played in the European dealing with society and traditions of India, see "Setting the Context" in: S. N. BALAGANGADHARA, *Reconceptualizing India Studies*, New Delhi 2012, pp. 235–237.

most influential *bhakti* traditions in India during the nineteenth century, according to British resources.[7]

I will show that this allegedly anti-caste Vaishnava movement had in fact participated in pan-Indian discussion about *brahmanas*, *ksatriyas* and others in the system called *varnasrama-dharma*. Teachers of the Chaitanya Vaishnava tradition considered this so-called caste system to be the best form of society. There is hardly a possibility that they were leaders of an "anti-caste movement". It was not anti-caste movement at any point in Indian history and we can proceed to other *bhakti* traditions to test, if the same understanding would be true for them. Although it seems to be rather negative conclusion, it is in fact a good starting point for another kind of research.

If this is the case, I have to attempt for more plausible explanation. If Chaitanya Vaishnavas considered *brahmanas* and other castes to be the best division of people in society, what will their discussions reveal about Indian understanding of *varna*? What were the ideas and questions that these *bhaktas* pursued? For example, a part of our dominant description is the conviction about birth as the main criterion for membership in a particular caste: Once somebody was born to his caste, he will remain its member till the end of his life. Yet Chaitanya Vaishnavas have argued otherwise. As we will see, they considered qualifications of a given person in order to find out if he is a *brahmana*, *ksatriya*, etc. In fact, they allowed for somebody born to one *varna* to become a member of another, even more respected *varna*. And they were also convinced that *brahmanas* (and others) can fall from their status and therefore loose their original *varna*.

Therefore, my main argument is that despite the dominant claims of modern scholarship, Indian criteria of division between people were not based only on birth to particular family and group. Apparently, the criteria of natural qualities and inclinations, independent of people's birth, were considered very seriously. This idea emerged within disputes between several traditions of Ancient India, and we can trace it in Indian thinking from the early Upanishads till today. I will also briefly point to the Chaitanya Vaishnava resources in order to find a framework of thought, which could enable Indian thinkers to reach such conclusions. It is meant as a step in clarifying conceptual quandary in the current scholarly discussion and more importantly, I hope, it is a fruitful direction in accesing the traditional understanding of *varna* in India.

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7   According to some scholars, Chaitanya Vaishnavas formed the largest single religious tradition of British India in the second half of the nineteenth century. See Edward BALFOUR, *The Cyclopædia of India and of Eastern and Southern Asia*, Vol. I, Graz 1967, p. 638.

Caste: what are we talking of?

There is a number of problems in older and recent attempts to define and to analyze caste. They can be shown well in the case of anti-caste discrimination legislation in Great Britain today. Let us start from the critique raised by Prakash Shah. He analyzed the attempts to formulate legislation against caste discrimination within the scope of British Equality Act. His analyses disclosed several problems: 1. Despite the fact that there is hardly any convincing evidence of the "caste discrimination cases" in the United Kingdom, some legislators confidently speak about the urgent need to implement legislation against it. 2. But the proponents of the legislation are not able to define the caste as such and therefore they are also not able to distinguish between supposed caste discrimination and other kinds of discrimination. 3. Because traditional Indian society has been criticized and its supposed evils has been denounced by Europeans for more than three hundred years, the discussion is soaked with preconceived moral judgments and emotions. I agree with Prakash Shah that it is the result of a serious intercultural misunderstanding: The proponents of new legislation took the Western descriptions of Indian society as the truth about it. The discussion is going on within the framework of this Western interpretation, which many Indians accepted as their own.[8] The last point cannot be stressed enough: not only that Western and Indian intellectuals take the Western framework of interpretation as the best space for discussion, this very framework prevents them even to ask: What has been the original Indian understanding of their own society? But before we will look more closely into this important issue in the following pages, let us consider what problems exactly are we facing in this case. Than we can proceed to the link with older attempts to understand caste system.

If somebody wishes to implement any legislation against caste discrimination, this person must have rather clear understanding what caste is and what it is not. How could you decide between different cases of discrimination otherwise? But materials provided by group of experts for the Equality and Human Rights Commission are far from desired clarity in understanding caste. Authors of the report *Caste in Britain: Socio-legal Review* admit that the main category in discussion, caste itself, remains a mystery for the researchers and lawyers alike. According to them, there are currently three domestic South Asian concepts to which caste refers: a) *varna*, b) *jati*, c) *biradari*. After several areas of implication have been discussed, we learn that caste was defined as "*a subset of race*", but also that this definition is not satisfactory. The report concludes:

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8   Prakash SHAH, *The moral basis of anti-caste legislation*, in: Public Spirit (www.publicspirit.org), posted on September 25th, 2013.

"*Currently there is no consensus on how a definition of caste should be formulated.* […] *Consequently there is a need to elaborate a new formulation or definition that more accurately reflects the experience of caste in Britain.*"[9]

Did the special seminar and workshop discussions of experts create satisfactory solution? Although the "minimum idea of caste" was suggested in terms of social stratification, inherited status and endogamy, wide range of diverse properties of caste was suggested. Birth, descend and origin; class, inherited social status, social ranking and hierarchy; guild; prejudice; stereotype; and religious. Another session of experts suggested also apartheid; cohesion; craft; exclusion; not hierarchy; pollution; and power relations, Given the fact that the material was supposed to help lawyers to formulate clear and unambiguous criteria, a reader is surprised to find this preliminary conclusion: "*Overall, there appeared to be a consensus that an elastic definition that addresses caste, without offending any religious group, was the best.*"[10]

How could a definition be elastic? Should it not be the most precise formulation of definiens that will make clear division lines between different categories? Another problem is that among the wide range of suggested criteria many fit also descriptions of Communist, Nazi and other totalitarian discriminative practices (for example, descend, class, power relations, prejudice, social ranking). On top of that, authors of the text did not attempt to explain the exact meaning of these general categories. Hence, the whole discussion remained at very general level and it is vague.

Experts did not agree if exceptions should follow the exceptions pertaining to race or to religion. Conclusion is giving us empty statements, such as "*caste was acknowledged to be a complex and changing phenomenon with varying significance among South Asian and other diaspora communities in Britain*".[11] Moreover, it is not clear from either of the two reports, if the discussants tried to define caste as a word referring to *varna*, or to *jati*, or to *biradari*, or perhaps to all of them? Another problem is this: I did not find any ideas that would direct attention of the experts to the differences between Western and Indian understanding of this issue.

Groping of experts in the case of British Equality Act mirrors the situation in social sciences and humanities during many decades. Sociologists, anthropologists, researchers in Indology, and other scholars who tried to define caste and to analyze the ways caste system works, admitted serious problems and inadequacy of older descriptions. In order

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9   Meena DHANDA et al., *Caste in Britain: Socio-legal Review*, in: Equality and Human Rights Commission Research report 91, Spring 2014, p. 36.

10   *Ibidem*, p. 28.

11   *Ibidem*, p. 41.

to see how the whole discussion has developed, let us start with older material. In the period prior to the time of World War II scholars had tried to provide a satisfactory definition of caste. They had followed the ideas of nineteenth century Orientalists, some had analyzed data collected during censuses in India. For this stage of the caste debates, I found work of A. Blunt to be an important overview.

Blunt was superintendent of the census operations of 1911 in the United Provinces in India and one of his duties was to make investigations "*into certain specific aspects of the caste system*".[12] During the twenties of the last century, Blunt collected a lot of material on caste system that had existed so far. His book is very serious and informed attempt to give "*a full and connected account of caste as a system, which describes the factors which brought caste system into existence, the evolution of the present system, the nature of the customs common to all castes, the principles which underlie those customs, and the reasons for similarity or difference between caste and caste*".[13]

A. Blunt also strived for a clear definition of caste and this is the result:

"*A caste is an endogamous group, or collection of endogamous groups, bearing a common name, membership of which is hereditary, arising from birth alone; imposing on its members certain restrictions in the matter of social intercourse; either (i) following a common traditional occupation, or (ii) claiming a common origin, or (iii) both following such occupation and claiming such origin; and generally regarded as forming a single homogenous community.*"[14]

Right from the beginning we see ambiguity of this attempt. The definition connects several characteristics suggested by previous authors. The most important of all is endogamy, but precisely in this point Blunt did not succeed to provide a clear criterion. Caste is either one endogamous group, or a collection of such groups which is not the same. One excludes the other, logically. If you will have endogamous groups A, B and C, from the principle of endogamy we can easily infer that members of group A will not marry members of groups B and C, etc. Collection of any number of endogamous groups does not create one larger endogamous unit, and therefore it is not clear what constitutes its unity, allegedly comparable to one endogamous group. From Blunts' definition only common traditional occupation remains, but he admitted himself that many castes do not fit this criterion.[15]

Let us consider endogamy as such, because it is the most commonly given definiens of caste. What does evidence from the experiences of the British in India say? Although

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12   A. E. H. BLUNT, *The Caste System of Northern India*, p. v.
13   *Ibidem*.
14   *Ibidem*, p. 5.
15   *Ibidem*, p. 3, and Chapter 12.

endogamy is given as one of the main characteristics of the castes and even more of the sub-castes, the British officers and scholars observed puzzling flexibility in the Indian reality:

"*The endogamy of a subcaste is not as rigid as that of a caste. A marriage between (say) a Brahman bridegroom and a Rajput bride is unthinkable, but intermarriages have occurred between subcastes of the same caste with no worse consequences than a purificatory sacrifice; and if circumstances make it desirable, such as lack of women, subcaste endogamy is abandoned. Even in the Brahman caste this has occurred. Subcaste endogamy is mutable; sometimes a subcaste which is endogamous in one place is not so in another. A trifling quarrel will drive two groups that formerly intermarried to endogamy: the removal of the cause of offense removes the restriction. But the most potent of all objections is the fact that endogamous subcastes are not regarded by their own members or by the rest of Hindu society as castes. To call such groups castes is to treat them as being what no Hindu would admit them to be. An investigator is not at liberty to manipulate his material so as to make it fit his theories.*"[16]

A. Blunt implicitly suggested, that if we are talking about caste, we should use it only for domestic category *varna*. By the quoted arguments Blunt tried to refute a proposal of M. Sénart, one of the recognized scholars of the period. What did Sénart suggest? It is rather sub-caste that should be called properly caste, because it is endogamous. Sénart had reasons to delegate endogamy to sub-castes (*jati*). For example, there are description of marriages between members of brahmanical and other *varnas* in the famous *Manavadharmasastra*. And Blunt had to admit few pages later in his own book that the same kind of mixed marriages described by Manu had been occurring still in modern times. Apparently, endogamy has not been the practice by which we can clearly define a particular caste as a group different from another caste.

In this dispute so far, we have two ideas: either it is *jati*, that is endogamous group, or it is *varna*, that is endogamous. Let us note three points: 1. There was more than enough empirical and historical evidence against both of these explanations. 2. Instead of admitting that evidence proved endogamy not to be a decisive criterion, A. Blunt tried to reconcile the problem by ascribing endogamy as the first characteristic to both *varna* and *jati*. 3. Despite these crucial problems of interpretation, quite some Indian authors did not have problems with repeating ideas of their colonial masters. The Western descriptions and criticism of caste system became accepted among educated circles of India in this way.[17]

This issue is further complicated by the repeated frustration of the officers and scholars, who tried to settle disturbing questions about caste with Indians themselves:

16 *Ibidem*, p. 6–7.
17 See for example Nripendra Kumar DUTT, *Origin and Growth of Caste in India*, Vol. I, London 1931.

"*Here we may notice how complicated is the segmentation of Hindu society. It is largely this fact which is responsible for the ignorance of the average Hindu about his caste system, and the difficulty, experienced at successive census enumerations, of obtaining a correct answer to the simple question: 'What is your caste?'. One man will state his social class, naming one of the ancient varnas – especially if the claim of his caste to belong to that varna is disputable, and he thinks it desirable to assert it. Another will give his endogamous subcaste – especially if it sounds better than his caste. A third will give his exogamous section; a fourth will mention some caste-title. The Hindu, generally speaking, is ignorant of all social distinctions which do not affect him personally, and very careless in his statement of those that do – a fact which makes the task of the enquirer into the caste none the easier.*"[18]

As decades have passed, scholars have been struggling with the same problems: How to define *varna* and *jati*? What is the relationship between these two categories? How does the whole system function? Whereas some repeated the ideas about endogamy, fixed social hierarchy controlled by *brahmanas*, occupational criteria, and Marxist or Weberian theories of classes as explanations for caste divisions,[19] others reported more and more evidence against these ideas. After World War II, different scholars pointed to examples of caste mobility,[20] to emergence of new castes (*jatis*),[21] or to marginalized fact that occupations of large number of members of all castes have been changing over generations. Many *brahmanas* who should be ruling priestly elite according to the dominant explanation were in fact poor and worked in all kinds of occupations.[22] Meanwhile, the dispute about the origins, development and functioning of the caste system has seen famous hypothesis of L. Dumont of the ritual purity – pollution scale, that should define the caste hierarchy, and its refutations.[23] Till today, scholars disagree both about the historical development of *varna* and *jati*, as well as about the realities they are supposed to describe. A summary of the situation from Brian K. Smith:

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18   A. E. H. BLUNT, *The Caste System of Northern India*, pp. 8–9.

19   Irfan HABIB, *Caste in Indian History*, in: Irfan Habib, Essays in Indian History. Towards a Marxist Perception, New Delhi 2013, pp. 161–179.

20   Changes in rank and prestige of different castes were described by well known concept of Sanskritization (M. N. Srinivas). There are many more studies about the topic, see for example David POCOCK, *The Movement of Castes*, Man 55, 1955, pp. 71–72; Hitesranjan SANYAL, *Continuities of Social Mobility in Traditional and Modern Society in India: Two Case Studies of Caste Mobility in Bengal*, The Journal of Asian Studies 30.2, 1971, pp. 315–339.

21   James S. SEBRING, *The Formation of New Castes: A Probable Case from North India*, American Anthropologist, New Series 74.3, 1972, pp. 587–600.

22   Noel P. GIST, *Caste in Transition: South India*, Phylon 15.2, 1954, pp. 155–164.

23   Louis DUMONT, *Homo Hierarchicus. The Caste System and its Implications*, revised English ed., Chicago 1980; Mary SEARLE-CHATTERJEE, *Contextualising Caste: Post-Dumontian Approaches*, Wiley-Blackwell 1995; Anthony GOOD, *Polemic against Dumontian Orthodoxy*, Current Anthropology 34.5, 1993, pp. 797–798; Declan QUIGLEY, *The Hierarchy Trap*, Current Anthropology 39.2, 1998, pp. 289–291.

> "*Different answers to the query regarding the relationship between class (varna) and caste (jati) have been put forth. In the scholarly literature, the terms 'varna' and 'jati' have sometimes been regarded as virtually interchangeable. Dumont more cautiously argues that the varna and caste systems are 'homologous', and that the varna system is indeed the caste system in embryo, 'both of which are structural, and both of which culminate in the Brahmans.' At the other end of the spectrum we find those who regard the varnas as purely theoretical constructs which refer 'at best only to the broad categories of the society and not to its real and effective units.'*"[24]

If experts are puzzled, what should the future generation of researchers think? Consider a student of South Asian history and culture who is reading assertions such as that given by Gavin Flood in his Introduction to Hinduism. Flood translated *varna* as "class" and *jati* as "caste". At the same time he admitted (emphasis mine): "[…] *the human* jatis *are a highly complex social reality which incorporate within them many sub-divisions. Indeed the Brahman and Ksatriya varnas are also taken to be jati. […] The exact historical relationship between* varna *and* jati *is unclear. It is not certain that the castes or* jatis *developed from the* varna *system. Indeed philosophical texts do not consistently distinguish between the two terms and, according to Halbfass,* jati *is used in the sense of* varna *in the Dharma Sastra literature.*"[25]

How to proceed in such a situation? Shall we discard the old concept of *varna* and study only existing *jatis*, as Srinivas suggested?[26] This proposal creates at least three serious problems: 1. We will have to explain why it make sense to many people in India today to identify themselves as members of different *varnas*. Therefore, the crucial questions remain: What is *varna*, what is *jati*, and what are the relationships between them? 2. It is not clear what constitutes decisive criteria for ranking of different *jatis* and their further inner divisions, and the same holds true for the rules that allow or ban inter-group marriages.[27] But it is quite clear that there is no pan-Indian ranking of *jatis*. 3. Even without *varna* system, *jati* remains a puzzling category:

> "[…] *all these various groups – those listed by Mr. Mandal's Commission and those being catalogued by the Anthropological Survey of India – may be called jatis, at least in the Bengali language. But can they all be legitimately designed in the English language as castes? There appears to be a problem of translation here. The term caste answers only partly, but not fully, to what*

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24   Brian K. SMITH, *Classifying the Universe. The Ancient Indian Varna System and the Origins of Caste*, New York – Oxford 1994, p. 317.

25   Gavin FLOOD, *An Introduction to Hinduism*, New Delhi 1998, pp. 59–60.

26   "*The* varna-*model has produced wrong and distorted image of caste. It is necessary for the sociologist to free himself from the hold of the* varna-*model if he wishes to understand the caste system.*" M. N. SRINIVAS, *Caste in Modern India and Other Essays*, Calcutta 1962, p. 66.

27   See for instance the discussion of *gotra*, clans and sub-castes in: Pauline KOLENDA, *Caste in Contemporary India. Beyond Organic Solidarity*, Prospect Heights 1985, pp. 14–22.

Bengalis mean by jat or jati, which may refer also, according to context and situation, to tribe, sect, and religious or linguistic minority."[28]

It is certainly true that by *jati* people in India and in Britain mean groups defined by quite a wide range of criteria. But our confusion is not primarily caused by a problem of translation, whether we talk about *varna*, *jati* or *biradari*. Why is there such a problem with definition of caste? What kind of problem is it? I will argue that it is not a problem of definition but first of all a problem of ideas that formed our understanding of society in India.

Given the fact that concepts of caste and sub-caste emerged within European thinking about society, whereas concepts of *varna* and *jati* originated in Indian thinking, we should consider the possibility that the respective terms refer to different realities in two different cultures. In other words, if we want to define a concept, we have to consider theory or theories of the relevant domains, in our case European and Indian thinking about their cultures. Definitions are created as a result of thinking within a particular theory, or at least some structure of thoughts. Even in case of ad-hoc definition there is some background framework of ideas that makes the definition meaningful. What were the original European ideas about caste and sub-case? How did Europeans develop their theories about society in India? In order to find out reasonable answers, we have to start with broader theoretical analyses.

Caste in the analyses of comparative research of cultures

Given all the problems sketched above, we will appreciate several contributions of S. N. Balagangadhara's research program of comparative science of cultures. His contribution is a unique research because his theories have been developed in the best tradition of modern philosophy of science. Thanks to insights of this discipline we can look at the development of scientific knowledge as a process, where not only theories, but also the whole paradigms or research programs compete. Western thinking about society in India has developed within a particular framework that can be called paradigm in terms of philosophy of science. If this paradigm remains in fact constrained by Christian theological thinking as S. N. Balagangadhara argued, than it does not fulfill several crucial requirements of scientific analyses. One of the most important requirements is never ending search for contradictions in our interpretations. When such a contradiction is found, we should work on its tentative resolution. But as we already observed in the case

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28   André BÉTEILLE, *Equality and Universality. Essays in Social and Political Theory*, in: The André Béteille Omnibus, New Delhi 2001, p. 68.

of caste system, even numerous problems both with the basic claims of the dominant story and with several particular ideas (such as endogamy being definiens of caste) did not lead many scholars to fundamental reconsideration of the whole framework of ideas about caste system.

Another important point was made in a discussion about the relationship between theories and observations. Whereas many scholars in humanities and social sciences still implicitly believe that from the correct observations in the field we can derive the right interpretation, several philosophers of science warned us of such a simplistic approach. There is a paradoxical problem: all facts that are results of scientific observations are "theory laden". It has been also disputed to what extant theories determine what can be observed at all:

> "[…] *there is no such thing as unprejudiced observation. All observation is an activitiy with an aim (to find, or to check, some regularity which is at least vaguely conjectured); an activity guided by problems, and by the context of expectations* […]. *There is no such thing as passive experience; no passivly impressed association of impressed ideas.*"[29]

How will these ideas help us in our discussion about caste system? I suggest that we start with analyses of a paradigm that have been crucial in the European attempts to understand society in India. Balagangadhara's research program brought to our full attention the continuing importance of Christian theological paradigm in European thinking about other cultures. He asked how did the culture of the observer reflect in the description of the observed culture. His answers provided an interesting understanding of both European experiences of other cultures and of the ways we, Europeans, experience and think about our own culture. Concept of religion has played a fundamental role in the European encounters with other cultures, and our interpretations of India were not an exemption. I will use only one part of Balagangadhara's argumentation, which shows how originally theological story of "degenerated religion of the Indian Heathens" was transformed into widely accepted religious history of Hinduism. Given the scope of this article, the following summary will be rather sketchy, leaving out many important points and connections.[30]

Since the early Christian apologetics, the European intellectuals have understood different cults of Ancient world as false religions, in contrast to their true religion. This simple division gradually built up a framework of thinking that does not allow for other

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29 Karl POPPER, *Unended Quest. An Intellectual Autobiography*, London 2002, p. 55.
30 In order to appreciate several connected and important arguments it is necessary to read at least the Introduction and chapters one to eight of S. N. BALAGANGADHARA, "*The Heathen in his Blindness…*" *Asia, the West, and the Dynamic of Religion*, Leiden 1994, pp. 1–288.

interpretations. Whatever other cultures unknown to them Europeans met in the course of Middle Ages and later, the range of their possible interpretations was constrained by this understanding: Either they would meet heathens, or heretics (which could be extended to Jews and Muslims alike), or there would be Christians "out there". Finding about other cultures was closely connected with another important fruit of Christian apologetics – the concept of universal history of humankind. With the firm belief in historical truth of Biblical stories Europeans included more facts about newly discovered cultures into the speculations about descendants of Noah. There were other important concepts and their discussions that were meaningful in this framework, such as ideas about God, soul, salvation, sin, good and evil, or justice and law.

When Europeans started to discover more about India since the end of fifteen century onwards, they encountered several problems in understanding the domestic societies. It was not clear why people respected *brahmanas* and ascetics so much. It seemed to be clear that non-Muslim majority followed rules of behaviour that must have been rather complex, but what were their foundations? The search for Indian laws started, rooted in the unquestioned truth of the Biblical story about God the original lawgiver. In this perspective, all nations had some access to revealed laws, or at least innate capacity to formulate some of them. Also, Europeans could hardly step out of their domestic experience of order in society and its laws. It was difficult for them to see that what they considered as universal principles were in fact particular results of Christian reworking of Ancient Roman law. They sought the Indian law that was inevitably supposed to be a part of the heathen religion. Although both Catholic and Protestant missionaries gathered a lot of interesting material in this regard, the task to discover "Hindu Law" was completed by early British Orientalists.

Within the framework of European theological understanding, *dharmasastras* ascribed to Manu, Apastambha, Gautama and others became the fundamental laws of the heathens. When William Jones translated *Manavadharmasastra*, he considered it to be the oldest document of the heathen law. We should remember, that in the eyes of early British Orientalists the heathen law meant corrupt version of the originally pure laws revealed by God to humankind since the times of Adam and later Noah. Such religious explanations played crucial role in determination of European questions and range of possible answers to them. Thus, Manu was considered to be Moses of India and William Jones looked at himself as fulfilling the same noble task as Roman emperor Justinian once had done.

One clarifying remark: There is no question that *Manavadharmasastra* and other such works did play some role in the conflicts and courts' proceedings. But let us keep in mind repeated complaints from the judges of the East India company that they did

not understand decisions made by domestic court *pandits*. In fact, this was one of the main reasons why W. Jones decided to learn Sanskrit and to translate Manu. Local scholars employed by the British Court in Calcutta often passed a judgment which was not understandable to Joneses' mind of a Western lawyer. We should also consider the fact that a large number of conflicts has been settled by families, friends, or *pancayats* till today. These incidental facts indicate that people of India have developed very different system of problem solving, including the punishment for crimes, from our own legal framework. What if *dharmasastras* played very different role from that of European codes of law?

Although it seems that Early Orientalists developed new theories free from the Christian theological roots, Balagangadhara convincingly argued for the opposite conclusion. These theological roots, or better to say the whole framework, faded into the background of the discussions during the second half on nineteenth and in the twentieth centuries. But its questions, problems and whole clusters of ideas still form and constrain the kind of discussions we have today. Many Christian ideas became "of course" axioms of the secularized Orientalist paradigm. Since the first publishing of Balagangadhara's analyses, several other authors showed how the celebrated Orientalists, such as William Jones or Thomas H. Colebrooke took over the old theological questions in their research.[31]

The story of religion in India played central role in many speculations since than. Cumulative efforts of several Orientalists' generations created very convincing account. It is a story of religion, which started with the coming of Aryans to India more than three thousands years ago. Aryan ritual specialists, *brahmanas*, soon rejoiced the power gained by their special knowledge and usurped the rule over early Indian society. Their supremacy was sanctified by the scriptures, *dharmasastras*. Here, we are supposed to have sacred basis for the model of hierarchical society with *brahmanas* on the top and untouchables on the bottom. This is how original Vedism degenerated into Brahmanism, said Orientalists. Four castes, *varnas*, tried to keep clear divisions between themselves by observing strict rules of marriages only within the respective *varna*. However, caste endogamy was difficult to maintain and therefore Indian people created more and more sub-castes, called *jati*. Meanwhile, there was a growing unrest in the Ancient Indian society:

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31 Among several studies of the topic, I found the following two to be the most interesting: Thomas TRAUTMANN, *Aryans and British India*, Berkeley 1997 and Urs APP, *The Birth of Orientalism*, Philadelphia – Oxford 2010.

"*There came a time, therefore, when priestly doctrines and popular beliefs became irreconcilable. Brahmanical pantheism, whose only deity was a hypostatized abstraction, wholly cold and wholly colourless, could not possibly attract worshipers who looked on their gods as personal conscious beings, both vigorous and active. It is probable, too, that the sacerdotal class had already begun to arrogate to itself authority in other spheres than that of religion, and had thus aroused the resentment of the Kshatriya nobility. Both the Brahman and the Brahmanical religion became thoroughly unpopular; and the result was that other religions arose, of which two were definite revolts against Brahmanism,* […] *Buddhism* […] *and Jainism.*"[32]

For some centuries, Buddhism gained the major influence over the subcontinent. But *brahmanas* were skilled in the adaptations of some attractive features of Buddhism, and in the course of the first millenium AD they won back their supremacy. It was not without other necessary changes, such as absorption of "primitive" and "low" religious ideas and practices, especially Tantric. At this stage we are talking about fully developed Hinduism. Yet the victorious *brahmanas* were not destined to enjoy their rule without opposition. The rule of priestly class has been challenged by new *bhakti* movements repeatedly. This last idea will be challenged in the following part of my argument.

For the moment let us realize that the textbook story outlined above was constructed on the basis of answers to originally theological questions. This view presupposes existence of one original Indian religion and its degeneration from Vedism to Brahmanism and later to Hinduism. Who was responsible for the alleged degeneration? Europeans found their answer: *brahmanas* were portrayed as crafty priesthood, deceiving the large masses of people in India. Brahmanas created caste system and thus maintained their rule over the society.[33] This religious explanation remained the basic framework for later sociological speculations about caste as specialization in occupation (Marx, Weber) and racial theories (Max Müller, Riesly, McDonnel, G. Childe). And in the cumulative work of Orientalists, sociologists and others it remains the dominant explanation till today. For more developed analyses of the connection between religion and caste see article of Jakob De Roover and Sarah Claerhout in this journal issue.

The British colonial rulers considered the caste system to be rooted in and sanctioned by religious (Hindu) law and this is a part of dominant explanation today. Given the whole framework of originally Christian thought Europeans were more or less compelled

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32 A. E. H. BLUNT, *The Caste System of Northen India*, p. 278.

33 Raf GELDERS, *Genealogy of Colonial Discourse: Hindu Traditions and the Limits of European Representations*, Comparative Studies in Society and History 51.3, 2009, pp. 563–589. It is noteworthy that the interpretation of *brahmanas* as a priestly ruling class was repeatedly challenged by European experiences of *brahmanas* who did all kinds of occupations, and who were sometimes among the poorest groups in some regions. This strange fact was noted by different Orientalists, but they explained it away by different strategies.

to see the Indian society in this way. But how do we get access to traditional Indian understanding of *varna* and *jati*? Why not to go and find out in discussions with Indians themselves? Here I wish to stress the point Balagangadhara made. It is difficult to have a reasonable discussion about these problems with many Indians even today. Many generations educated under the British rule have passed the colonial legacy to present people of India:

> "*Indian intellectuals and reformers enthusiastically embrace the criticism of the Brahmin priesthood, which was a reformulation of the Protestant criticism of Catholic Christianity, as scientific criticism of the caste system. How is it possible to have a firm moral opinion on the caste system, when no one understands what that system is?* […] *As indicated already, the Western cultural experience of India has assumed the status of a scientific framework for describing Indian culture and society.* […] *In this process, one accepts that the European cultural experience of India is a scientific framework for Indians to understand their own culture. However, this very acceptance prevents them from accessing their culture and experience.*"[34]

In such a situation it is not possible to proceed just with answers to questionaries collected from Indian towns and villages. After all, British anthropologists and census officials did a lot of such research with no satisfactory results, as was already mentioned. In Popper's words, search of these Europeans was guided by their specific horizon of expectations. We should carefully analyze the ideas that led to formulation of problems within this horizon. They have to be analyzed within the whole framework of thought, with its basic axioms and ideas. By looking closely at one problem after another we can start to see how certain puzzles and contradictions emerged, what were the initial questions of researchers who started to form the field of caste studies, and how did the whole discussion transform in course of time. Only after this we can develop better theories. In the composite story of caste and religion in India, I will focus on one such string of interpretation: the alleged protesting movements against brahmanical orthodoxy.

Were ascetic and *bhakti* traditions anti-caste movements?

One important idea originally formed within the theological paradigm is interpretation of ancient ascetic traditions as protestant movements against brahmanical orthodoxy and its "empty ritualism". In the similar way as the raise of Buddhists and Jains, later *bhakti* traditions have been typically portrayed as anti-caste, egalitarian movements during many decades of modern scholarship. Yet many scholars who held this opinion have been repeating that *bhakti* movements hardly changed the caste divisions in larger

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34   S. N. BALAGANGADHARA, *Reconceptualizing India Studies*, pp. 116–117.

Indian society. In fact, *bhakti* traditions often created their own caste divisions. Let us consider these problems now. This is typical Western description of *bhakti* movements:

> "*These holy men rejected the necessity of the Brahman intermediary, as well as the caste ladder of ascent to rebirth. The hymns and poems of the bhakti cults were written by saints of a variety of caste origins.* […] *Thus, much of the inspirational leadership was held by non-Brahmans, who were often of humble caste rank. In this sense, the bhakti sects were anti-Brahman – rejecting the priest as intermediary, and holding out hope for direct salvation.*"[35]

Two noteworthy points about this account: 1. It pre-supposes the Christian theme of priesthood as intermediary (apparently between the believer and his god) to be the model for the relationship between *brahmanas* and the rest of Indian society. 2. It pre-supposes that *brahmanas* misused their position and therefore there was a need for liberation from their monopoly over spiritual matters. This is Protestant Christian theme projected on Indian reality (let us note also the idea of "direct salvation" in the quotation). Bhakti movements were seen as analogous to European Protestantism. Why should we suppose that European religious history repeated itself in other cultures?

Moreover, this explanation has another serious problem. Despite the fact that in this perspective *bhakti* gurus and their followers were seen as critics of the caste system, proponents of this idea admitted very strange historical evidence:

> "[…] *the bhakti spirit of intercaste communal devotion does not seem to have affected the local functioning ritual-occupational caste systems.* […] *There is little direct criticism of the social order. In fact, people converting to bhakti sects in past centuries have formed new castes (Dumont 1970: 188), so that sectarian castes constitute a minor number of castes in the local caste systems.*"[36]

If there are such serious problems with the dominant explanation, let us try to find more plausible theory. S. N. Balagangadhara formulated interesting arguments concerning the alleged anti-caste agenda of ancient ascetic movements, called *sramanas*. I think that we can apply the same for later *bhakti* movements, but let me summarize the ideas of the Indo-Belgian researcher first.

If Buddhist and Jains rejected caste system and revolted against *brahmanas*, we should find some evidence of it, suggested Balagangadhara. What we find in the respected texts of these traditions instead, are discussions of the theme: Who is a true *brahmana*? That is, what qualities a true *brahmana* should have, which of them are more important than others, which acts disqualify one from being a true *brahmana*, etc. Another point to consider is in the famous story where Buddha explains the emergence of four *varnas*:

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35   P. KOLENDA, *Caste in Contemporary India*, p. 115.
36   *Ibidem*, pp. 115–116.

They were constituted according to *dharma*. How could something that Buddha was supposed to reject, emerge and function according to *dharma* in his view? This is hardly evidence for Buddhist rejection of "caste system". Similarly we found a list of qualities that makes somebody into a true *brahmana* in *Uttaradhyayanasutra* of Jains.[37]

Would we like to keep the interpretation of ascetic revolt against the caste system, the goal of Buddhists and Jains should be the rejection of it and establishment of a new form of society. The evidence shows very different picture: *sramanas* participated in very serious debates about qualities of true *brahmanas* (and mutatis mutandis, about true *ksatriyas* and members of other *varnas)*. While the *sramanas* stood outside of the society, they had householder followers and thus they had to respond to the questions about the best ways society should function. Their response was affirmative to ideals of *varna* system.[38] After these findings, to hold the dominant idea about ascetic revolt against caste system is equally untenable as the following claim: Marx rejected the bourgeois society and revolted against capitalism by saying that it is not truly capitalist society.[39]

These arguments have serious implications for the whole fabric of dominant explanation. What if the ideals and practices connected with *varnasrama-dharma* are part of such a different cultural framework, that all our attempts to draw it into our framework of understanding are hopelessly damaging the original Indian thinking? What if the *bhakti* traditions have not been concerned with the rejection of the caste system at all? What will their discussions tell us about Indian understanding of their society? I took my research interest, Chaitanya Vaishnavas, as an example of such a *bhakti* movement for testing the attempt to start solving these problems.

Majority of modern scholars, both Western and Indian, described Chaitanya and his followers as the propagators of social reformation in the sixteenth century India. This is an example from the first scholarly book about Chaitanya Vaishnavas that was written in English by D. Ch. Sen after World War I:

> "*Those that would say that he was lacking in poise should be reminded of his many-sided intellectual activities and his heroic attitude in the reorganisation of the Hindu society. He selected men from amongst his followers to work in different spheres of life for the propagation of faith and social reformation.* […] *Chaitanya had found the caste-system eating into the vitals of our social fabric, and he and his followers were determined to root out this evil from the land. For,*

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37 S. N. BALAGANGADHARA, "*The Heathen in his Blindness…*", pp. 207–217.

38 Reality proves the theoretical point: There have been Buddhist and Jain *brahmanas* since the time of founding gurus till today (India, Bali).

39 S. N. BALAGANGADHARA, "*The Heathen in his Blindness…*", pp. 208–209.

the moment you say that you love God, all human beings will be your brethren; there will be no Brahmin, no Sudra."[40]

Although later scholars admitted for Christian bias of D. Ch. Sen's writings,[41] the alleged anti-caste agenda of Chaitanya movement has been stressed again and again. How well does this idea explain the evidence we have about this tradition? We find the same strange inconsistency in this particular case as we did in the general description of *bhakti* movements quoted earlier. According to quite some scholars, this *bhakti* movement retained hierarchical social order and yet it was able to weaken the authority of *brahmanas* and to spread egalitarian ideas around:

"*The Chaitanyites were no social reformers militating against the caste structure, but within the sphere of devotional practice they completely rejected all distinctions of caste and thus promoted a sense of equality that penetrated deep into Bengali life.*"[42]

How was this possible? Wilhelm Halbfass gave an answer which is representative for many books on the topic:

"*A number of soteriological and theological attempts to re-define the concept of dharma and to loosen its close ties to the caste system may be found in the theistic movements, especially in the definition of the love of God* (bhakti) *as the* "*highest dharma*" (paramo dharmah) *that was advanced by the Chaitanya school and other movements affiliated with the Bhagavata-purana.*"[43]

But curiously enough, the result of such attempts was the establishment of caste ranking even within this Vaishnava tradition:

"*Despite their idea of egalitarian fraternity among castes, the disciples of the saint Chaitanya in Bengal have established a caste ranking within their sect.*"[44]

The dominant theory does not explain these problems. Instead of digging deeper both into the theoretical foundations of problematic explanation and into available historical evidence, scholars just repeated the story about reform movement that did not succeed. At the same time they suggested that in some vague sense the *bhakti*

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40 Dinesh Chandra SEN, *Chaitanya and His Age*, Calcutta 1922, pp. 278–279.
41 Edward DIMOCK, *The Place of Hidden Moon. Erotic Mysticism in the Vaishnava-sahajiya Cult of Bengal*, Chicago 1989, p. 59.
42 J. T. F. JORDENS, *Medieval Hindu Devotionalism*, in: Arthur Llewellyn Basham (ed.), A Cultural History of India, New Delhi 1975, p. 273.
43 Wilhelm HALBFASS, *India and Europe. An Essay in Understanding*, Ney York 1988, pp. 330–331.
44 Masahiko TOGAWA, *An Abode of the Godess. Kingship, Caste and Sacrificial Organisation in a Bengali Village*, New Delhi 2006, p. 18.

movement succeeded. In the previous section I outlined the kind of questioning needed to develop better explanations. But even when we consider historical evidence, I did not find one author who would ask questions like this one: Why did not the disciples of Chaitanya attempt to establish egalitarian community, if their main base – Bengal – had been ruled by Muslim dynasties in the sixteenth century? During the successful spread of the movement in the second half of the same century, we have evidence of the Great Mughal Akbar's support to different old and new communities, including famous followers of Chaitanya, the six Goswamis of Vrndavan. It would be an ideal opportunity for such a social experiment. We also know that Chaitanya had to face the questioning of local *kazi* because of the criticism raised by some *smarta-brahmanas*, and that he succeeded to defend his new movement. Even more reasons to give up brahmanical ideas and practices, one would think. So how to account for the fact that Chaitanyas never tried to create a new society without divisions to *varnas* and *jatis*?

What we see instead of such serious questioning is a rising popularity of very suspicious idea: *bhakti* traditions are expressions of continuous struggle of oppressed people, especially out-castes, in the Indian history. One example for all (emphasis mine):

> "*The Dalit movement in India has roots in the reformative Bhakti Movement. The Bhakti Movement thrived in pockets across the country over several centuries. The Bhakti Movement was not an organized movement but a conglomeration of the individual efforts of various saints and social reformers who pursued their ideas though their writings, folk culture and belief in one divine power.* The Bhakti Movement was anti-caste, anti-elite, pro-women, pro-poor, anti-Sanskrit, and affirmed that genuine love of God was sufficient to find solutions to social problems. *The movement attracted large numbers of the lower castes and poor, including women (Srinivas, 1996). Though, the Bhakti Movement has not spoken exclusively for the Dalits or proposed any agenda for radical changes in the social structure of Hindu society, it has established a pattern of questioning the Hindu social order which later provided a platform for an organised Dalit Movement with a strong voice for social reforms.*"[45]

This amounts to ideological invocation of a single anti-caste stream in Indian history, picked up uncritically by scholars and others today. Let us note several problems of the text: What should one understand exactly under the claims that "*Bhakti Movement was anti-elite, pro-women, pro-poor*"? They are vague, too general and to use them without context and explanation can be described only as repeating slogans. Another point: Author of the paper shows complete ignorance when he says that *bhakti* movements were "*anti-Sanskrit*". In order to prove this claim, he should provide us with very convincing arguments that will exclude *sampradayas* of Ramanuja, Chaitanya, Vallabha and many

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45   Shyam SINGH, *Dalit Movement and Emergence of the Bahujan Samaj Party in Uttar Pradesh: Politics and Priorities*, in: Working Paper 242, Institute for Social and Economical Change, Bangalore 2010, p. 1.

other Vaishnava groups, as well as many Shaivas and others from the category of *bhakti* movements.[46] There are no such arguments even attempted for in the quoted paper. Instead of critical scholarship, the article accepts originally Western ideas about Indian society and connects them to recent political agenda of certain groups in India.

S. N. Balagangadhara disclosed very well what is the problem of this kind of approach (emphasis mine):

> "*One of the striking things about British rule in India is its success in developing certain ways of talking about Indian culture and society. The British criticized Indian religion; the Indian caste system…* They retold Indian intellectual history by describing it as indigenous responses to some of the ills that they, the British, saw in Indian society and culture; *for example, Buddhism, as it emerged out of their reconstruction, was a revolt against Brahmanism and caste system (Almond 1988) even if, as a revolt against the caste system, it did not prove very successful.*"[47]

I propose that the same holds true for *bhakti* traditions, as can be shown in the case of Chaitanya Vaishnavas.

Chaitanya Vaishnavas about *varnasrama-dharma*

How did teachers of the Chaitanya tradition talk about *varnas*? Did they discuss *brahmanas*? If yes, what was at stake in theory and in practice? For the analyses, I choose work of two important teachers in this *bhakti* tradition: Kedarnath Datta Bhaktivinode (1838–1914) and his son, who is known under his ascetic name Bhaktisiddhanta Sarasvati (1874–1937). They are seen as reformers of the Chaitanya Vaishnava movement itself. At the end of this part of argument I will mention also evidence from earlier history of the movement.

Bhaktivinode was influenced by discussions with Alexander Duff and other important Christian missionaries. He also studied and discussed with Brahmos and Unitarians, etc. This Vaishnava teacher studied some works of the British scientific literature, too. He knew about the European criticism of Hinduism and caste system very well. Nevertheless, Bhaktivinode embraced the practices and teachings of Chaitanya. At the same time he tried to respond to the British challenges from within the tradition as he understood it. What do we learn from his books about the way Chaitanyas discussed *varna* in Indian society?

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46   Chaitanya Vaishnava scholars wrote hundreds of works in Sanskrit, and the tradition of study, discussion and writting in this old language is still going on. See for example Sushil Kumar DE, *Studies in Bengal Vaishnavism*, Indian Studies. Past and present 1.2, 1960, pp. 65–135.

47   S. N. BALAGANGADHARA, *Reconceptualising India Studies*, p. 98.

Bhaktivinode's work is interesting because he seems to accept the British idea of degenerated religion and society in India. But the story is not that simple, as we shall see. Let us start with summary of Bhaktivinode's opinions by Shukavak Dasa:

"[…] *originally the system of varnasrama was pure and based on scientific principles, but gradually from the time of Jamadagni and Parasurama, the system became corrupt and deviated from its original purpose. As a result, a quarrel broke out between the brahmanas and ksatriyas. […] Due to the selfish desires of the brahmanas, birth as the criteria of varna was inscribed into the* Manu-samhita *and other* dharma-sastras. *In frustration, the rebellious ksatriyas created Buddhism and the vaisyas created Jainism and both tried to bring the downfall of brahmanism. […] The present caste system is the corrupted remnant of that originally pure scientific varnasrama-dharma.*"[48]

It seems that Bhaktivinode said the same thing as the Europeans did, including the idea of protestant ascetic movements. But in fact the Vaishnava teacher was not against the *varna* system. He suggested a restoration of "originally pure" brahmanical ideals, the restoration of what he described as *vaijnanika-varnasrama*, the system based on knowledge of ancient *rsis*.[49] His idea of degeneration is very traditional Puranic account about the degraded age of Kali (*kali-yuga*) Christian story of degeneration of pristine monotheism. Bhaktivinode also thought that the four divisions of society are natural and in this sense they manifest universal human tendency towards particular occupations: "*When we consider the modern societies in Europe, whatever beauty exists in these societies depends upon the natural* varnasrama *that exists within them.*"[50]

Bhaktivinode's book *Jaiva-dharma* contains interesting discussions for our topic. Within the book's story a respected Vaishnava teacher answered the following question: Why do Vaishnavas reject certain brahmanical practices? His answers started from a general remark about three paths for different kinds of people. According to their eligibility (*adhikara*) people follow one of the paths: *karma*, *jnana*, or *bhakti*. But all of them have to act in the sense of auspicious activities. These auspicious activities are called *nitya-karma* (daily rites or duties) and *naimittika-karma* (occasional, due to circumstances, such as funeral rites). And for these activities certain kind of social division is the best:

"*The authors of the* sastras *first examined the natures of human beings and their natural eligibility traits, and then established* varnasrama-dharma. *Their intention was to prescribe a system in*

48 Shukavak N. DASA, *Hindu encounter with modernity: Kedarnath Datta Bhaktivinoda, Vaishnava theologian*, Los Angeles 1999, p. 212.
49 *Ibidem*, p. 211.
50 *Ibidem*, p. 212.

which nitya-karma *and* naimittika-karma *could be carried out in an excellent way in this world. The gist of this arrangement is that there are four natural types of human beings, classified according to the work they are eligible to perform: brahmanas. […] The different* varnas *are determined by nature, birth, activities, and characteristics. When* varna *is determined only on the bases of birth, the original purpose of* varnasrama *is lost.*"[51]

Our disputed topic – relationship between Vaishnavas and *brahmanas* – was the theme of special meeting that took place in the village of Balighai, West Bengal, in September 1911. Bhaktisiddhanta Sarasvati addressed a huge gathering of Chaitanya Vaishnavas, including some of their most respected scholars, as well as some *smarta-brahmanas* and others. Bhaktisiddhanta had argued for three days about the following claims: a) *brahmanas* are glorious and respected throughout the history of India; b) but even those born in highly respected families can fall from the elevated position because of their bad activities; c) thus they should be considered only relatives of *brahmanas* (*brahma-bandhu*); d) all *varnas* are in a certain sense *brahmanas*, because they all came from Brahma; e) many respected texts like *Upanisads* or *Mahabharata* tell stories about people born to a particular *varna*, who became recognized as members of another *varna*, some of the heroes became *brahmanas;* f) therefore, true *brahmana* is recognized only if he shows qualities like simplicity, truthfulness, compassion, etc.; g) Vaishnavas and *brahmanas* should maintain mutual respect, they are like brothers to each other; h) the divisions of *varna* were created according to the symptoms of qualities and occupations.[52]

The examples I chose could be criticized for representing only a specific tendecy within the tradition, and also for the specific period of time. But many biographies of Chaitanya and his disciples confirm that Bhaktivinode and Bhaktisiddhanta were representing continuity of the prevailing Vaishnava attitudes towards *brahmanas* and brahminhood. Allow me to quote at length from the recent article of J. T. O'Connell, one of the most recognized authorities among the scholars who studied Chaitanya Vaishnava tradition:

"*Chaitanya Vaishnavas (at least as reflected in their sixteenth-seventeenth century texts) were circumspect and accommodating when relating to Brahmans and Brahmanic socio-ritual norms (O'Connell, 1993). Their copious literature records relatively little evidence of hostility of Vaishnavas toward Brahmans generally. What we do find, however, is considerable criticism by Vaishnavas of the practice of animal slaughter by a class of ritual priests of Shakta cults. And the latter stand accused of retaliating by ritually defiling the house of a Vaishnava. Scattered throughout the sacred*

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51   Thakura Srila BHAKTIVINODA, *Jaiva-Dharma*, New Delhi 2001, p. 47.
52   Thakura Srila BHAKTISIDDHANTA SARASVATI, *Brahmana and Vaishnava*, New Delhi 1999.

biographies of Chaitanya we also find some harsh words about 'pasandis' (hypocrites), who often are Brahmans. But these are usually isolated remarks about particular individuals, not criticisms of Brahmans or Brahmanical norms generally.

Outside Navadvip town, […] there seem to have prevailed reasonably good relations between the Chaitanya Vaishnavas and Brahmans at large. One reason for this would likely have been that, with certain exceptions, Brahmans stood to gain, or at least not lose, professional patronage as the Vaishnavas' influence spread. The latter, most of whose eminent leaders were themselves Brahmans, regularly invited Brahmans to grace festivals and expected them to continue to perform the various rites of passage and other domestic rituals for Vaishnava client families, provided these were done in forms compatible with Vaishnava norms. Vaishnava gurus generally confined themselves to the roles of initiating gurus, preachers, spiritual advisors and officiants at specifically devotional functions."[53]

It is important to note that Chaitanyas followed much older tradition of Vaishnava interpretations. Their teachers repeatedly stressed the fact that birth (*jati*) is not the main criterion for decision about *varna* of a person. For example, *Bhagavatapurana* describes qualities of a *brahmana* in this way: peacefulness, self-control, austerity, purity, satisfaction, forgiveness, simplicity, knowledge, truthfulness, etc.[54] Few verses later it is explicitly said that although somebody was born into some *varna*, this person's true *varna* should be accepted according to the symptoms described above. Respected medieval Vaishnava scholar Sridhara Svami commented this verse as follows: The main characteristics of *brahmanas* are qualities such as peacefulness, not birth from a particular mother. If these characteristics are seen in somebody born in another *varna*, than such a person should be considered according to them, not because of his particular birth.[55]

From the evidence we can already argue that Chaitanya Vaishnavas considered division of people into different *varnas* to be the best model for society in general and for their practices in particular. If they criticized *brahmanas*, the main goal of this criticism was to defend true brahminical qualities according to their best knowledge. We do not see any doubts about the importance of *brahmanas* and other *varnas* in society, on the contrary. We see basically the same model as with the former ascetic movements. Teachers of the chosen *bhakti* tradition (that was supposed to be anti-caste and egalitarian) were

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53   Joseph T. O'CONNELL, *Chaitanya Vaishnava Devotion (*bhakti*) and Ethics as Socially Integrative in Sultanate Bengal*, Bangladesh e-Journal of Sociology 8.1, 2011, pp. 60–61.

54   *Bhagavatapurana* 7.11.21.

55   *Bhagavatapurana* 7.11.35 and commentary of Sridhara Svami, Sanskrit original and translation quoted in: T. S. BHAKTISIDDHANTA SARASVATI, *Brahmana and Vaishnava*, p. 229. Tradition of stories which describe how a person from one *varna* became a member of another goes back to upanisadic stories. One of the most quoted is the story how Satyakama Jabala, a son of maiden and unknown man was accepted to be a *brahmana* because of his complete truthfullness.

concerned with the proper functioning of different *varnas*. They have argued in order to find answers to a crucial question: Who is a true *brahamana*? And similarly they sought answers to questions about criteria to discern who is a true *ksatriya*, *vaisya* and *sudra*.

Although more research is needed, it is also becoming clear that across the centuries Chaitanya Vaishnavas were repeatedly stressing the idea that birth alone is not the main criterion for being in any *varna*. And very often they pointed to the possibility of loosing or gaining another *varna* in one's life. In these debates, one of the main issues was qualification of a particular person (*adhikara*). Although Chaitanya Vaishnavas criticized certain practices of some *brahmanas* in their time (such as animal sacrifice or the effectiveness of purificatory rituals), in general they accepted brahmanical standards and values having been led by many *brahmanas* themselves. These discussions were crucial for practical problems solved by Vaishnava teachers, such as: Who is qualified to teach? Who is eligible to give initiation to disciples? Who can perform rites for *salagramsila*, recitations, *puja*, etc.? What behavior is proper for a teacher? Another reason to take seriously Chaitanya Vaishnava discussions of criteria that determine everybody's *varna*.

What exactly did Chaitanya Vaishnavas mean, when they talked about qualities and qualifications that make one into a *brahmana*? I want to point to often overlooked concept of *adhikara*, which can be roughly translated as qualification, or eligibility. It is mainly a set of qualities and natural inclinations to certain activities which makes a person into a *brahmana*, *ksatriya*, etc. Yet, in order to provide reasonably meaningful explanation of the concept of *adhikara*, we have to develop a good theory about several lines of traditional Indian thinking. For example, Chaitanya Vaishnavas often referred to the verses of *Bhagavadgita* that are describing what qualities *brahmanas*, *ksatriyas* and members of other *varnas* should exhibit. The works of *brahmanas*, *ksatriyas*, *vaisyas* and *sudras* are divided according to the qualities that constitute their nature.[56] There is no verse of *Bhagavadgita* which would describe birth (*jati*) as the criterion for a person being classified into particular *varna*. Rather, sloka 4.13 clearly states: "*The system of four Varnas was created by Me according to distinction of Gunas and Karma.*"[57] In another words, natural qualities and inclinations to certain type of activities are considered. But to start understanding these discussions will need a thorough reasoning about concepts such as *guna* within a promising theory about the whole cluster of ideas from the traditional Indian thinking.

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56   *Sri Ramanuja Gita Bhasya.* With Text and English Translation, Madras n.d., pp. 575–577.
57   *Ibidem*, p. 166.

Preliminary conclusions

What better understanding of problems with caste and *varna* can we get from our discussion so far? I suggest that the whole scholarly (and also legal) discussion is based on serious misunderstanding. First of all, the discussion remains to be constrained by the Christian theological thinking which created the story of religion in India and its decay in the hands of crafty priesthood. Only within this framework it makes sense to talk about religious hierarchy in South Asian society and about the protestant *bhakti* movements. Secondly, should we keep the dominant ideas about caste system as they are, we will not be moving towards understanding Indian culture at all.

From the study case of Chaitanya movement I argued for two conclusions. We should not accept the idea of *bhakti* traditions as protestant anti-caste movements, a kind of forerunners for so called Dalit activism today. It is untenable in the light of textual and historical evidence. What we can do instead is to dig into the traditional Indian understanding of categories *varna* and *jati*. In this paper, I limited myself to the Vaishnava understanding of *varna* only. And this is the second finding: Chaitanya Vaishnava teachers were proponents of *varnasrama* ideals for society in India. They continued the old pan-Indian discussion of the question: What makes somebody into a *brahmana*? Their answers were widely shared Indian ideals of compassionate, self-restrained, and wise people who strive for knowledge and who serve others. Bhaktivinode Thakura and Bhaktisiddhanta Sarasvati argued that *varnasrama-dharma* is the best condition for the development of *bhakti*. If Buddha said that the goal of *brahmanas* and *sramanas* is the same, these Vaishnava teachers said that brahmanical qualities are necessary for a *bhakta* to advance on the path of *rasa*.[58] And they were apparently concerned also with the ways *ksatriyas* and member of other *varnas* should act. In both cases, teachers of these Indian traditions wanted to retain the system of four *varnas*. If they criticized *brahmanas*, it was because in their eyes those particular *brahmanas* were not truly following the path of their *dharma* and, consequently, they were not true *brahmanas* any longer (concept of *brahma-bandhu*).

If we really want to take traditional Indian understanding seriously, a new approach to its research is necessary. It will focus on theorizing domestic framework within which ideas such as *guna* (mode of nature), *adhikara* (eligibility or qualification) and *svabhava* (natural inclination) make sense. This kind of research will create new hypothesis

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58 Sanskrit term *rasa* is used in some *bhakti* traditions as generic category for a number of emotional and aesthetical experiences. It is like a concert of main and subordinated emotions, with all kinds of their subtle shades that makes the relationship between a *bhakta* and his beloved god very intense and dynamic.

which should enable us to answer important questions such as: What is the domestic understanding of *varna*, *jati,* and *biradari*? How do Indians decide about the status of different people?

─────────── **Resumé** ───────────

Kasta nebo kvalifikace?

Diskuse čaitanjovských višnuistů o bráhmanech v dobách koloniální nadvlády Britů nad Indií

Oproti převládajícímu přesvědčení o tom, jak funguje kastovní systém v Indii, autor ukazuje, že ve skutečnosti máme daleko ke skutečnému porozumění byť jen jeho základním jednotkám zvaným varna a džáti. Jelikož mnoho badatelů není schopno předložit žádná uspokojivá řešení problémů s vymezením kast a podkast v Indii, je nezbytné analyzovat celý myšlenkový rámec, ve kterém se moderní debata o kastách rozvinula. Hlavní tezí tohoto článku je tvrzení, že debaty o kastovním systému jsou formovány a zároveň omezeny dědictvím křesťanského teologického myšlení ve výzkumu prvních generací orientalistů. V první části textu jsou analyzovány rozpory několika zásadních tvrzení v oblasti studia kast. Teprve pak autor rozvíjí kritiku převládající interpretace vzniku a rozvoje bhaktických tradic v indických dějinách. Přestože jsou tyto tradice často popisovány jako protest proti kastovnímu systému všeobecně a obzvláště pak proti bráhmanské ortodoxii, relevantní historické doklady ukazují velice odlišný obraz. Vybraným příkladem pro tuto kritickou analýzu je hnutí čaitanjovských višnuistů, jedna z nejrozšířenějších bhaktických tradic v dobách nadvlády Britů nad Indií. Zdroje této tradice ukazují, že ve skutečnosti šlo v daném bhaktickém hnutí o udržení ideálu čtyř varen a jeho aplikaci ve společnosti. Příležitostná kritika bráhmanů byla vedena proto, aby byly hájeny ideály pravého bráhmanství, a nikde nenacházíme doklady byť jen pokusu o ustavení alernativní (ne-kastovní) společnosti. Argumentace autora hledá řešení tohoto problému v rámci výzkumu komparativního studia náboženství a kultur, který byl iniciován S. N. Bálagangádharou.