

5 The Indian Middle Class as a Field of Colonial Encounters

The “Indian middle class” is often described as the cradle of a pan-Indian nationalism and independence.¹ However, there is no linear development from the formation of an “Indian middle class” to the development of a pan-Indian nationalism and the resulting independence. Rather, we find a long process of establishing, altering, and reestablishing relations in numerous encounters in ongoing processes of hybridization. The Theosophical Society provided an important platform for these processes. To begin with, we can note that Theosophists were instrumental in the establishment of the Indian National Congress. Allan Octavian Hume (1829–1912), a retired British officer of the Indian Civil Service in contact with Viceroy Lord Rippon and also his successor Viceroy Lord Dufferin,² was pivotal in the founding of the Indian National Congress. Hume joined the Theosophical Society in 1880, two years before he retired to Shimla where he became the president of the Shimla branch.³ He and Alfred Percy Sinnett (1840–1921) both lived at Shimla, where Blavatsky and Olcott visited them in 1880.⁴ In 1865, Shimla had become the official summer capital of the British administration when John Lawrence, the Viceroy at the time, moved there to escape the heat that was characteristic of most of the subcontinent. As Metcalf and Metcalf argue, “hill stations” such as Shimla were part of an unofficial system of racial differentiation in colonial India. Just as urban centers were divided into an “old city” and a European quarter, so the Europeans marked themselves off from the “common Indians” when they fled the hot summer

1 Kenneth W. Jones and Gordon Johnson, *Socio-Religious Reform Movements in British India*, The New Cambridge History of India 1 (Cambridge: Cambridge University Press, 1997), 184–209; Thomas R. Metcalf, *Ideologies of the Raj*, The New Cambridge History of India 4 (Cambridge: Cambridge University Press, 1998), 222–34; Sanjay Joshi, “Introduction,” in Joshi, *The Middle Class in Colonial India*, xv.

2 Campbell, *Ancient Wisdom Revived*, 81–82.

3 For information on Hume, see Campbell, *Ancient Wisdom Revived*, 81–82; Mark Bevir, “Theosophy and the Origins of the Indian National Congress,” *International Journal of Hindu Studies* 7, 1–3 (2003): 102.

4 Godwin, “Blavatsky and the First Generation of Theosophy,” 23.

months to take refuge in the mountains, or even returned to England.⁵ As Nethercot tells us, Besant herself usually spent her Indian summers in England.⁶

At Shimla, Blavatsky performed two of her “miracles”: the “cup-and-saucer incident” and the “brooch incident”, as they came to be known, both of which were crucial in encouraging Hume and Sinnett to join the Theosophical Society.⁷ Hume’s membership of the Theosophical Society was relatively brief, lasting just three years until he left in 1883. Although he never doubted the existence of the Mahatmas, his criticism of Blavatsky ultimately led him to resign.⁸ Hume went on to become an important contributor to the formation of a pan-Indian society. The first meeting of the Indian National Union took place in December 1885, during which it was immediately renamed the Indian National Congress.⁹ Hume’s involvement was initiated by the Theosophical masters, who allegedly informed him about the dangers India was facing and told him that he should get involved in Indian politics for the sake of the Indian people.¹⁰ In 1917 Annie Besant became the president of the Indian National Congress. All these nation-building engagements on the part of Theosophists were pursued in close association with Indian Theosophists and non-Theosophists, most of them members of the Indian middle class.¹¹ The Theosophical Society provided organizational structures, such

5 Barbara D. Metcalf, Thomas R. Metcalf and Barbara Daly Metcalf, *A Concise History of Modern India*, 3rd ed., Cambridge Concise Histories (Cambridge: Cambridge University Press, 2012), 110–11.

6 Arthur Hobart Nethercot, *The Last Four Lives of Annie Besant*, 2 vols. 2 (London: Rupert Hart-Davis, 1963), 70.

7 Campbell, *Ancient Wisdom Revived*, 81–82 The cup and the saucer are part of the exhibition at the headquarters of the Theosophical Society at Adyar.

8 For a thorough discussion of the argument between Blavatsky and Hume, see Ulrich Harlass, “Die orientalische Wende der Theosophischen Gesellschaft: Eine Untersuchung der theosophischen Lehrentwicklungen in der Zeit zwischen den Hauptwerken Alfred Percy Sinnetts” (Inauguraldissertation zur Erlangung der Doktorwürde, Philosophische Fakultät, Universität Heidelberg, 07.08.2019), 119–21.

9 Bevir, “Theosophy and the Origins of the Indian National Congress,” 111.

10 Bevir, “Theosophy and the Origins of the Indian National Congress,” 110.

11 For a discussion of the Theosophical influence on the formation of the Indian National Congress, see, besides Campbell and Bevir, also Lubelsky, *Celestial India*, 247–84. For Besant’s political engagement in India, see Muriel Pécastaing-Boissière and Marie Terrier, *Annie Besant: Weisheit und Wissenschaft*, Deutsche Ausgabe, 1. Auflage (Grafing: Aquamarin Verlag, 2017), Die Biographie, 263–311; Anne Taylor, *Annie Besant: A Biography* (Oxford, New York: Oxford University Press, 1992), 277–326; Nethercot, *The Last Four Lives of Annie Besant*, 213–306. Although the three biographies provide ample details and numerous dates and documents, they lack an analysis of the development of Besant’s Theosophy. This remains a research desideratum, although one that is partly realized by Wessinger; see Catherine Wessinger Lowman, *Annie Besant and Progressive Messianism (1847–1933)*, Studies in Women and Religion 26

as journals and magazines, infrastructure for meetings and housing, and education for both Indian and non-Indian Theosophists, and also for non-members who frequented the society's facilities or read its publications. The mutual engagement between Indians and non-Indians is documented in the wide range of topics discussed in the multitude of Theosophical journals and in the diverse subjects taught at Theosophical schools.



Figure 1: Besant lecturing in front of a large crowd in Bombay. (Photograph by an unknown photographer. Mumbai, not dated. Courtesy of the Theosophical Society, International Headquarters: Adyar Library and Research Centre).

Just three years after the foundation of the Theosophical Society, Olcott and Blavatsky moved to India. When they arrived in Bombay, Olcott fell to his knees and kissed the ground in a display of reverence. Soon after, he began to hold lectures around India on a variety of themes. One of the major topics on which he spoke was the revitalization of Sanskrit and India's position as the

(Lewiston N.Y.: E. Mellen Press, 1988), 209–62. For the connection between Gandhi and Besant and their eventual falling out, see also Bergunder, “Gandhi, Esoterik und das Christentum” and Bergunder, “Experiments with Theosophical Truth.”

“cradle of humanity.” The giving of public lectures was one of the most important factors in the dissemination of Theosophical ideas. Besant was regarded as one of the most gifted orators of her time,¹² and her lectures drew large crowds in countries such as the United Kingdom, the U.S., and Australia, and sometimes reached as many as several thousand people in India (Figure 1).¹³ Many of these lectures were later published in printed editions and it should be no surprise that many of the sources used for the present book are verbatim records of lectures given by eminent Theosophists.

Just as important as the lectures given by prominent Theosophists were the journals published by the Society. The most important of these, *The Theosophist*, was first published in October 1879.¹⁴ When Olcott and Blavatsky arrived in India, interest in their Theosophical Society arose primarily among the English-educated Indian middle class, but many British residents of South Asia also found the ideas stimulating, and interest in the Theosophical Society increased in the wider world as well. As a result, Blavatsky and Olcott were flooded with letters from around the globe. At the same time as these increased demands on their time and attention, they were confronted with financial problems arising from misjudged investments. The publication of a widely read popular journal offered a means of ameliorating both the problem of an unmanageable flood of letters and that of a lack of income.¹⁵ As Prothero notes, the outspokenly anti-missionary attitude of Blavatsky and Olcott and the “*Theosophist*’s mix of East and West, primitivism and science, esotericism and freethought hit the mark, at least among its target audience of India’s English-speaking anti-missionary-yet-vaguely-pro-Western middle class.”¹⁶ Campbell argues along similar lines that the founders’ sympathy towards “Hinduism” and Buddhism, and their admiration of India’s ancient past, was appealing for members of the “Indian middle class.”¹⁷ With a publication run of more than 600 copies after only three months, the sales of *The Theosophist* were profitable within just six months of its initial publication, a respectably high number for the time.

The Theosophical Society’s journal was favorably reviewed in several of India’s papers and less favorably in a number of missionary journals, which

12 Nethercot, *The Last Four Lives of Annie Besant*, 166.

13 Nethercot, *The Last Four Lives of Annie Besant*, 16.

14 Campbell, *Ancient Wisdom Revived*, 78–79.

15 Stephen R. Prothero, *The White Buddhist: The Asian Odyssey of Henry Steel Olcott*, Religion in North America (Bloomington: Indiana University Press, 1996), 81.

16 Prothero, *The White Buddhist*, 83.

17 Campbell, *Ancient Wisdom Revived*, 79.

latter boosted its popularity rather than diminishing it.¹⁸ The success of the journal was also founded on it providing a medium for South Asians to publish their own articles. As will be discussed in Chapter 10.6, numerous South Asian authors published their work in *The Theosophist*, and these pieces were not necessarily confined to “Theosophical” topics. This is especially true in the case of proponents of Vedānta such as Rama Misra Shastree, who could publish in a journal with a relatively large readership in order to argue his case in a debate which, initially at least, had nothing to do with Theosophy (see Chapter 10.5). As such, the journal belonged to the wider public sphere and provided the possibility for numerous encounters.

The Theosophist was only one of many Theosophically aligned journals that were published all around the world. It may well have been the most influential, and some of the others were only very short lived, but many achieved significant followings of their own and some continue to be published today, as does, for example, *The Indian Theosophist*. Morrisson holds that these periodicals served at least three purposes: 1) to spread Theosophical ideas, 2) to provide support for the emerging institution, both financially and in terms of the growth of its membership, and 3) to assist in legitimizing Theosophical ideas beyond the membership and out into the wider society by paralleling scholarly journals.¹⁹ In achieving these three goals, the importance of the Theosophical journals cannot be overestimated.

Besant’s endeavors as a publicist were most important both for spreading her Theosophical ideas and also for promoting her political and educational goals. Already in her pre-Theosophical career, she had successively engaged in writing for numerous journals and then editing and publishing periodicals, including *Our Corner*, *The Link*, and *National Reformer*.²⁰ She continued to do so when she joined the Theosophical Society. She wrote copiously in several Theosophical journals, including *The Theosophist* and *Lucifer*, both of which she would later edit. She also founded new journals, such as the weekly *Central Hindu College Magazine* and the daily *New India*.²¹ The importance of these

18 Prothero, *The White Buddhist*, 83; Campbell, *Ancient Wisdom Revived*, 79.

19 Mark S. Morrisson, “The Periodical Culture of the Occult Revival: Esoteric Wisdom, Modernity and Counter-Public Spheres,” *Journal of Modern Literature* 31, no. 2 (2007): 4.

20 Arthur Hobart Nethercot, *The First Five Lives of Annie Besant*, 2 vols. 1 (London: Rupert Hart-Davis, 1961), 80–88, 198–211, 263–275. For a discussion of some of the contents of *Our Corner* and *National Reformer*, see also Taylor, *Annie Besant*, 173–220. For a discussion of *The Link*, see also Pécastaing-Boissière and Terrier, *Annie Besant*, 194–96.

21 There is little information on these journals. On *New India*, see e.g. Taylor, *Annie Besant*, 300–321. On *The Central Hindu College Magazine*, see Chapter 13 and Nethercot, *The Last Four Lives of Annie Besant*, 68–69.

periodicals for the spread of Theosophical ideas and the growth of the Theosophical Society is generally accepted in the literature.²² Nevertheless, with the exception of some research on German Theosophical journals and the journals of the Anthropologische Gesellschaft,²³ a systematic overview of the Theosophical journals, in part and in whole, remains a research desideratum, as does a thorough analysis of the vast corpus of material contained in these publications.

The other essential element in the dissemination of Theosophical ideas was the educational institutions run by the Theosophical Society. The history of the spread of this school system, as well as its extent, are still uncharted. In the following I will provide a short overview of that school system and point to its importance as a means for the spread of Theosophy in South Asia and beyond. As an example of this system, the Central Hindu College is discussed in more detail in Chapter 13.

When Olcott and Blavatsky first travelled to Ceylon in 1880 they found that there was a well-functioning educational system sponsored by the government. It was, however, irritating for them that almost all of these institutions were non-Buddhist schools. While this did not mean that Buddhists were unable to attend the schools, it was the Christian religion that was taught rather than Buddhism, and the language of instruction was usually English.²⁴ Notwithstanding that Olcott's campaigns on the island must be understood in light of Buddhist revival on Ceylon it is not the scope to discuss that context here. I will, thus, confine myself to a brief contextualization of the situation, focusing on the establishment of a Theosophical Buddhist Society and on the foundation of numerous (Theosophical) Buddhist schools on the island.

Theravāda Buddhism on Ceylon and the Sangha there were closely interlinked with the kingly dynasties. As in other Buddhist traditions, the Sangha consisted for the most part of ordained monks and nuns. However, their influence had been in decline for centuries since the arrival of the Portuguese at the beginning of the sixteenth century. In the middle of the eighteenth century, a revival was initiated that led to the reintroduction from Thailand of higher

22 E.g. Morisson, "The Periodical Culture of the Occult Revival".

23 Götz Deimann and Norbert Deuchert, eds., *Die anthroposophischen Zeitschriften von 1903 bis 1985: Bibliographie und Lebensbilder*, Beiträge und Quellen zur Geschichte der anthroposophischen Bewegung und Gesellschaft (Stuttgart: Freies Geistesleben, 1987); Helmut Zander, "Theosophische Zeitschriften in Deutschland bis 1945," in *Aufbrüche – Seitenpfade – Abwege: Suchbewegungen und Subkulturen im 20. Jahrhundert; Festschrift für Ulrich Linse*, ed. Judith Baumgartner and Bernd Wedemeyer-Kolwe (Würzburg: Königshausen & Neumann, 2004) Both of these publications are, however, of only limited relevance for the present book.

24 Prothero, *The White Buddhist*, 86.

ordination to the Ceylonese Sangha, by which one took on the status of a fully ordained monk or nun. This revival was a project of the elites and culminated in the Sangha's refusal to ordain anyone who did not belong to the highest caste. The fisher caste, which by this time had gained a great deal of influence and wealth due to centuries of foreign trade which had largely confined itself to the shores and port stations of Ceylon, responded by seeking alternative venues for higher ordination, which they ultimately found in Burma. After their ordination, members of this caste formed a counterweight to the traditional Ceylonese Sangha through the foundation of the Amarapura Nikāya. This fraternity was acknowledged by the British administration. In turn, the traditional Sangha in the Kandy region tried to come to an agreement with the British to secure their own status. An agreement was initially established which aimed to secure the status of the Sangha, but this agreement was undermined by changing views in the British administration which led to a decline in the status of the traditional Ceylonese Sangha.²⁵

Christian missionaries such as Spence Hardy (see Chapter 9.3) did their part to discredit traditional Buddhist learning and to establish Christian missionary schools. English education and Christian baptism became compulsory for anyone who wished to receive a government position. In the mid-nineteenth century, the Buddhists of Ceylon began to react to this incipient Christian dominance by entering into a debate with the Christian missionaries, both in print and in public lectures and discussions. The best known of these public debates was that which took place in 1873 in Pānadura, a little to the south of Colombo. The event extended over two days, and the debate was later printed in book form. A copy of this book found its way into Olcott's possession.²⁶

Immediately after his arrival in Ceylon, Olcott set out on a lecture tour during which he discussed his ideas on Buddhism, presenting Buddha as a great social and religious reformer, and championing a view of a "purified" Buddhism. Buddhism, he argued, should be restored to its ancient greatness by cleansing it of the degenerative elements that corrupted its present state. As Campbell argues, the Theosophists were warmly welcomed in Ceylon because they were seen as "Westerners" who would support the cause of the Buddhist

²⁵ Richard Francis Gombrich, *Theravada Buddhism: A Social History from Ancient Benares to Modern Colombo* (New York: Routledge, 1995), 157–58.

²⁶ For a comprehensive presentation of that Buddhist revival in association with what Gombrich associates with "Protestant Buddhism," which is closely linked to Olcott's campaigns and the Anagarika Dharmapala, see Gombrich, *Theravada Buddhism*, 172–92.

revival. This picture of the “Western” champions of Buddhism was staged by Olcott and Blavatsky through their formal “conversion” to Buddhism.²⁷ Olcott lectured copiously in a number of places, including Kandy and Colombo. On his first tour, he established no fewer than eight branches of the newly founded Buddhist Theosophical Society. Of these eight branches, seven were established as lay branches and only one as a monastic branch.²⁸ The idea of a laity was a novelty in Ceylon, and it was on the basis of this novelty that the Buddhist Theosophical Societies built their influence.²⁹ While traveling through Ceylon in 1880, the pair founded several schools which were directly affiliated to the Buddhist Theosophical Societies. These schools not only drew in Buddhists, but also many Christian students. By the time Olcott and Blavatsky returned to India after their first tour, the Theosophical founders had left a decisive mark on Ceylon. While they were in Ceylon, they had been introduced to several important lay people as well as to some notable monks, most importantly Hikkaduve Sumangala, who became an important supporter of Olcott. Several other trips to Ceylon followed and numerous schools and branches of the Buddhist Theosophical Society were opened. Olcott also spent a considerable amount of his time in Ceylon lecturing on and practicing Mesmerist healing, among other things.³⁰

The establishment of the schools alone might not, by itself, indicate that they were also intended to be institutions that aimed at the dissemination of Theosophical ideas. However, Olcott’s *Buddhist Catechism*, first published in 1881, illustrates well that he saw himself not merely as a student but rather as a teacher of Buddhism. The *Catechism* was published in both English and Sinhalese.³¹ It initiated a tradition of catechisms published by the Theosophical Society, such as the *Sanâtana Dharma Catechism*, published twenty-two years later for use in the Central Hindu College (see Chapter 13). As Brettfeld and Zander show, the *Catechism* itself should be understood as a work which was, although authored by Olcott, much influenced by Hikkaduve, especially with regard to the question of “Individuality” and its relation to “Nirvana.” Brettfeld and Zander also document some of the changes in the *Catechism* that took place across its numerous editions, illustrating a process of continuous alterations in Olcott’s

27 Prothero, *The White Buddhist*, 96; Campbell, *Ancient Wisdom Revived*, 83; Gombrich, *Theravada Buddhism*, 185.

28 Prothero, *The White Buddhist*, 96–97.

29 Gombrich, *Theravada Buddhism*, 186.

30 Prothero, *The White Buddhist*, 96–113.

31 Sven Brettfeld and Helmut Zander, “Henry Steel Olcott: The Buddhist Catechism (India, 1881/1908),” in *Religious Dynamics Under the Impact of Imperialism and Colonialism: A Sourcebook*, ed. Björn Bentlage et al., Numen Book Series volume 154 (Leiden, Boston: Brill, 2016), 473.

position as it evolved through multifaceted encounters with “Buddhism.”³² In this respect, Olcott’s *Catechism* can be understood, in terms of the analytical tool developed in this book, as a “hybrid” book. However, it is beyond the scope of this chapter to analyze the “hybridizations processes” that informed the production of Olcott’s work. Apart from Brettfeld and Zander’s pioneering article, there have been no scholarly analyses of either the *Catechism* or the Buddhist schools of Ceylon. The Theosophical school system on Ceylon thus remains a research gap for future scholars to fill.

As for the other Theosophical schools, there is even less research available. What little information there is on the schools is to be found in general works on the history of the Theosophical Society, so thorough studies of the various aspects of Theosophical education remain research desiderata. Some investigation has been carried out on the Steiner schools, mainly those in Germany,³³ and there has been a little research on the Point Loma Theosophical schools and universities founded by Kathrine Tingley.³⁴ Lawson, meanwhile, has discussed the connections between Spiritualist and Theosophical education, but without providing any wider contextualization.³⁵

The year 1894 marked an important development in Theosophical education. Olcott founded the first schools for the “Panchamas,” as he called the untouchables of the Hindu caste system. The Olcott Free School was the first such school to be opened in Madras, with the aim of providing a technical education to its students. This pioneering institution received a great deal of contemporary attention and even gained support from the governor of Madras. As a result, numerous other such schools were opened. These schools were administered by Sarah E. Palmer and N. Almee Courtwright, two American women who were educational reformers with experience of working in underprivileged areas of the U.S. As Prothero argues, these schools were not meant to provide an education that would lead on to higher academic degrees but were intended, rather, to prepare the pupils for labor that would secure their daily needs.³⁶

Olcott had another idea in mind for the Indian middle class. In 1894 he founded the Hindu Boys’ Association, an association not unlike the YMCA. It

³² Brettfeld and Zander, “Henry Steel Olcott.”

³³ See Helmut Zander, *Anthroposophie in Deutschland: Theosophische Weltanschauung und gesellschaftliche Praxis 1884–1945* (Göttingen: Vandenhoeck & Ruprecht, 2007), 1357–1455.

³⁴ Tim Rudbøg, “Point Loma, Theosophy, and Kathrine Tingley,” in Hammer; Rothstein, *Handbook of the Theosophical Current*, 61–66.

³⁵ Max Lawson, “Theosophy and Education: From Spiritualism to Theosophy,” *Theosophical History* IV, no. 3 (1992).

³⁶ Prothero, *The White Buddhist*, 136–39; Campbell, *Ancient Wisdom Revived*, 114.

had a magazine, the *Arya Bala Bodhini*, which was printed in English and which later became *The Central Hindu College Magazine*. Among the numerous topics it addressed, the *Arya Bala Bodhini* promoted English dress for Indian schoolboys while upholding Hindu ideals. For use by Indian middle-class schoolboys, Olcott also issued another catechism, the *Dwaita Catechism*.³⁷ It is plausible that the Hindu Boys' Association was the model on which Besant based her ideas for the Central Hindu College.

Besant was interested in education already in her pre-Theosophical career. She was elected to the London School Board in 1888 and served as a member until 1891.³⁸ In 1896–7, while on her lecturing tour through Northern India, Besant started to collect money to support her plan to establish a Hindu school for boys (on the Central Hindu College, see Chapter 13), and later a school for girls. In the subsequent years, numerous other Theosophical schools were founded or became affiliated with the Central Hindu College.³⁹ In the current state of research, it cannot be said how many other Theosophical schools were founded in India, although an unpublished article from the Adyar archives lists more than thirty-five schools that were established by The Society for the Promotion of National Education. This society was founded in 1916 by members of the Theosophical Society and later, in 1924, merged with the Theosophical Educational Trust.⁴⁰ Besant seems to have been involved in both of these organizations but no research has been conducted on either. Theosophical education in other parts of the world remains similarly uncharted.

The necessarily incomplete overview presented above draws a picture of the Theosophical Society as a structure in South Asia. Above all, it was the Society's publications, and its journals in particular, that were most important for the spread of Theosophical thought in South Asia, as well as elsewhere. In addition, many Theosophists spent significant amounts of time lecturing on Theosophical topics. Besant, for example, lectured in numerous countries, including the U.S., many European countries, India, and Australia. Indeed, sometimes she lectured in all of the above in a single year, traveling around the globe for

37 Prothero, *The White Buddhist*, 144–46.

38 For a discussion of the school board and its early female members, see Jane Martin, "Entering the Public Arena: The Female Members of the London School Board, 1870-1904," *History of Education* 22, no. 3 (1993). For some additional context and on Besant's engagement with the school board, see Nethercot, *The First Five Lives of Annie Besant*, 276–86.

39 Nethercot, *The Last Four Lives of Annie Besant*, 62–90.

40 Anon, *Society for the Promotion of National Education* (Adyar, unpublished). A copy of this document was handed to me on the last day of my research in the Theosophical archives in Adyar. The archivist could not give me any further information on its providence.

months by ship and train, and even, from 1924, by plane.⁴¹ Last but not least, the Theosophical schools were institutions in which Theosophical thought often formed the basis for the instruction provided, as will be discussed in more detail in Chapter 13. This structure formed an important part of the upper-case “Indian Middle Class” (see below) and initiated numerous encounters between “Westerners” and “Easterners.”

While both the Theosophical journals and the Theosophical school system remain under-researched, all these interactions collectively point towards an intense engagement in this field of encounters by a significant number of Theosophists. When considered in this context, the Theosophical Society can be understood as a *intermediating* structure which connected the English Society (Shimla) and the Indian middle class (Indian Theosophists), and also, at the same time, as an mediating structure that influenced and altered the field of encounters in which these connections took place.⁴² I argue that although evolutionist claims and attempts to establish an orthodox authority (e.g., the Blavatsky-Row argument, see Chapter 12.8) were common in the Theosophical Society, its Indian members exerted great influence, not only in the society itself but also in the “Indian middle class.”

The “Indian middle class” defined itself – and was repeatedly defined by others – by a differentiation from other “classes,” especially the lower classes, and by comparison to “the Western middle class.” As Joshi rightly points out, the middle class was never constituted by a homogeneous group of people. Regional, religious, and social differences within what became known as “the middle class” were much more significant than the later narrative would have it. I do not, thus, attempt to provide an essentialist picture of “the Indian middle class” in what follows but, rather, to map out what is understood in this book as a “field of encounters.” This field has several dimensions. First, the middle class is understood as consisting of actors who were able to encounter one another in a variety of ways (see 5.2.3). Secondly, it is understood as a network of literary production that was responsible for the publication of journals, magazines, and newspapers, as well as for writing pamphlets, giving public presentations, and so on. These media enabled encounters between actors that bridged spatial and temporal limitations (see 5.2.4). Thirdly, this field of encounters is understood as part of the global colonial discursive continuum, within which it constitutes a single discursive field that was potentially connected to all others. “Indian” here connotes a

⁴¹ Pécastaing-Boissière and Terrier, *Annie Besant*, 239–40.

⁴² Significant as it was, the Theosophical Society was not the only such structure, as is illustrated by the example of Rajendralal Mitra, who was a member of the Asiatic Society of Bengal and its first Indian president (see Chapter 10).

geographical localization and not a localization that is ethical or nationalist. Indian and non-Indian actors alike engaged in this field of encounters (see 5.2.5).

5.1 Why a “Field of Colonial Encounters”?

The “middle class,” which gradually started to adopt this label from the middle of the 19th century onwards, grew not merely in numbers but also in confidence during this period. Ideas associated with “Western” middle class identities were adopted by members who saw themselves increasingly as “champions of enlightenment, freedom, and progress, as well as the crusaders against superstition.”⁴³ These were characteristics and values the colonialists attributed to themselves and used to legitimize the colonization of India in the first place. The repetition of these topoi in the “Indian middle class” can be read in terms of the textual manifestation of relations between the colonizers and colonized. In Bhabha’s words, the middle class pursued a strategy of “mimicry.”⁴⁴ This hybridization process went back and forth between colonizer and colonized, and also between groups of Indians themselves, as the example of Ghosh illustrates (see the discussion below). Joshi argues that the anxiety of inauthenticity was one of the key features of the contemporary discourse on middle-class identity. This would fit well with Bhabha’s concepts of the “in-between” and “mimicry,” a fit that is unsurprising given that Bhabha developed his theory specifically with this “middle” or “in-between” class in mind.⁴⁵

⁴³ Joshi, “Introduction,” xxi–xxiii.

⁴⁴ Bhabha, “Of Mimicry and Man,” 123.

⁴⁵ Huddart, *Homi K. Bhabha*, 61 Here we “encounter” an inescapable problem of historical research and theory building. If we look at the “Indian middle class” in particular, we see “in-betweenness” everywhere. However, in identifying this characteristic we risk falling into a tautological circle, for the subject matter we seek to analyze using these theoretical constructs is the same material from consideration of which Bhabha developed the constructs. It is no surprise, then, that we should find “in-betweenness” in the source material for the concept of “the in-between.”

5.2 The Emergence of the Indian Middle Class: Historical Background

Traditional approaches – especially those of the Cambridge school of historians, but also approaches pursued by Indian historians – have conceptualized the “middle class” in India as a product of British education and an incomplete copy of the “real” middle class in the “West.”⁴⁶ At the beginning of the British engagement in India through the medium of the East India Company, the company’s officers were in need of allies who could secure their trade interests. During the decades that followed, the Company established a diversified system of direct and indirect rule based on close cooperation with locals. Hindu rulers were established in what Susan Bayly calls “sponsored ‘Hindu’ realms,”⁴⁷ with the “new” rulers in many cases being recruited from the kshatriya caste in order to provide a counterweight to brahmin influence. The legitimization of the “restoration” of the “old” regimes was provided by a massive publication of literature that communicated “Hindu” values. As a result, these texts were popularized and became known to a wider public.⁴⁸ Bayly explains that during the 18th century the officers of the East India Company set in train a process that made it politically advantageous for Indians to deploy the unifying categories of caste identities as strategies by which they could claim authority. This led to an increased consciousness of caste status in Indian society. At the same time, trade, social and economic changes, and the spread of British rule, which gradually replaced that of the Mughal Empire, together induced an increased mobility in South Asia. These changes were both supported by and fostered a denser network of knowledge exchange.⁴⁹ These interconnections between foreign rule and indigenous rulers were in no way exclusive to South Asia.⁵⁰ As Reinhard argues, the British Empire was much weaker in its ability to exercise power than the colonized suspected, something that continued to be true under the Raj once the Crown replaced the East India Company as the ruler of India.⁵¹ After 1830, the British established a new regime of government, although still under the rule of

⁴⁶ Joshi, “Introduction,” xxxii–xxxiii.

⁴⁷ Susan Bayly, *Caste, Society and Politics in India from Eighteenth Century to the Modern Age*, The New Cambridge History of India IV-3 (Cambridge: Cambridge University Press, 2001), 89.

⁴⁸ Bayly, *Caste, Society and Politics in India from Eighteenth Century to the Modern Age*, 90–91.

⁴⁹ Bayly, *Caste, Society and Politics in India from Eighteenth Century to the Modern Age*, 94–95.

⁵⁰ Bayly, *The Birth of the Modern World, 1780–1914*, 79.

⁵¹ Wolfgang Reinhard, *Die Unterwerfung der Welt: Globalgeschichte der europäischen Expansion 1415–2015* (München: C. H. Beck, 2016), 774–75.

the East India Company. “Britishness,” and especially the claim of the racial and cultural superiority of the English gentleman, became the leitmotif of this rule. These developments went hand in hand with increased educational endeavors – often provided by the missionaries who were allowed to establish themselves in India only after 1813 – and cultural exports in the fields of sports, the arts, architecture, and, of course, foods and drink. These cultural imports and the establishment of governmental structures, and probably also the claim of racial and cultural superiority, were among the many factors that contributed to the eruption in 1857 of what was termed “the Munity.” This tumultuous event had long-lasting consequences for British rule in India, not least because it led in 1858 to the replacement of Company rule with direct rule by the British crown. The integration of India into the empire reached a new level in 1876 when Queen Victoria adopted the title of Empress of India. While the East India Company had already based their rule on their relationships with Indian collaborators, after the Mutiny the British government sought to establish a closer collaboration with an Indian elite that would secure their hegemony.⁵² Introduced by Thomas Babington Macaulay, the British school system in India aimed at the creation of this Indian elite. In 1857, shortly before the Munity, the first three universities were established in India with the goal of educating this elite and making them “loyal servants.”⁵³ These developments had a great impact on Indian society and contributed significantly to the emergence of an Indian middle class.

Several authors have contested this chronological narrative. Christopher Bayly, for example, argues that prior to British rule India had a “public sphere” that was dominated by what he terms the “north Indian ecumene.” In his view, this was a group of well-educated influential Hindu literati, Muslim notables, and state officers – both Hindu and Muslim – who engaged in social, religious, and political critique long before the 19th century. Bayly thus presents the middle class under British rule not as something new but as the continuation of a pre-existing native middle class.⁵⁴ In Chatterjee’s view – his theory plainly owes a great deal to postcolonial considerations – the Indian nation-building project had to distinguish itself from the colonial narrative while simultaneously adopting the discourse practices of the colonial power. Indian nation builders, Chatterjee explains, built on the colonial structures and appropriated the discourses of

⁵² Reinhard, *Die Unterwerfung der Welt*, 778–85.

⁵³ Peter van der Veer, *Imperial Encounters: Religion and Modernity in India and Britain* (Delhi: Permanent Black, 2006), 6; Leah Renold, *A Hindu Education: Early Years of the Banaras Hindu University* (New Delhi, New York: Oxford University Press, 2005), 29–31.

⁵⁴ Christopher A. Bayly, “A Pre-History of the Middle Class?,” in Joshi, *The Middle Class in Colonial India*.

reason and the institutions of law and administration while at the same time claiming superiority in the realm of spirituality. They thus translated the orientalist narrative of the spiritual “East” into their nationalist discourse. Chatterjee further explains that the notions of the “natural” and the “rural” were invoked as a counter ideal to the rationalist “West.” The middle class described by Chatterjee played a mediating role in this field by ensuring that the “natural” and “spiritual” they invoked was of a “classical” purity and devoid of degeneration, a goal that Chatterjee maintains was built on the blueprint of European classicism.⁵⁵ His description focuses on the manifold encounters between “Eastern” and “Western” ideas in the heterogeneous field of the Indian middle class. This perspective fits well with what are understood in this book as processes of hybridization, since he describes the appropriation and reformulation of discursive strategies in a constant process of negotiation in politics and the arts.

Similar topoi can also be found in the Theosophical Society. Like the middle classes, Theosophists also invoked the “spiritual” or “irrational” (Blavatsky’s miracles at Shimla) while maintaining that these powers were in fact natural and part of the ancient wisdom (Chatterjee’s classicist argument). On the other hand, Bayly’s contribution shows that these discursive strategies were built on a preexisting foundation of “cultural entrepreneurship,” as Joshi would term it, which was itself hybrid because it emerged in the encounter with the previous rulers of India and in close contact with the Persian and Arabic languages. Taking these views into consideration, I would like to understand the “Indian middle class” not as a specific group of people but rather as a field of discourse, a field of encounters in which actors of various ethnicities could engage.

5.3 Encounters Between Individuals: Texts as Manifestations of Encounters and Established Relations

It is at the same time both unsurprising and a telling instance of hybridization that Jawaharlal Nehru’s *Discovery of India* (1889–1964, 1946) influenced much of the discourse about the Indian middle class. In this work, Nehru argued – with a strong Marxist undertone that, while common to the time and also common to the writings of several of his fellow Indians, is interesting to note given Besant’s socialist history – that the changing economic circumstances influenced the

⁵⁵ Partha Chatterjee, “The Subalternity of a Nationalist Elite,” in Joshi, *The Middle Class in Colonial India*.

Indian classes and established the new middle class.⁵⁶ The text is a social critique of the capitalist exploitation of Indian workers sprinkled with a romanticizing view of the proletariat. On the other hand, Nehru also described the middle class as being in a condition that was “even more pitiful than that of the peasantry.”⁵⁷ Referring to Gandhi’s involvement in Indian politics, Nehru discussed two virtues that he understood as instrumental for Indian freedom and as remedies for the “pitiful” state in which the middle class found itself: “fearlessness and truth.”⁵⁸ These words stand out particularly strikingly in the context of the present book. “Fearlessness” (*abhaya*) was identified as a key virtue for initiation in Besant’s writings⁵⁹ and was also propounded as such in the *Sanātana Dharma Text Books* (see Chapter 13.4). Leading experts today translate *abhaya* as “fearlessness,”⁶⁰ as did Annie Besant⁶¹ and the translators of Gandhi’s Gujarati rendering of the *Gita*,⁶² but, as will be argued below, this rendering of *abhaya* was not canonical in the 19th century.⁶³ As for the word “truth,” similar observations can be made. “Truth” was one of the leading principles in Theosophy. The motto of the Theosophical Society is still “There is no religion higher than truth.” The argument is not that Nehru necessarily had Besant’s *Gita*, the *Sanātana Dharma Texts Books*, or the Theosophical motto in mind when he wrote about *abhaya* or *satya* (“truth”), but that his use of these terms points towards numerous relations that were established in previous hybridization processes. Both Nehru and Gandhi⁶⁴ knew Besant and knew her *Bhagavadgītā* translations. In the case of Nehru, it is also likely that he was familiar with the *Sanātana Dharma Text Books*. His father was a long-standing Theosophist and young Jawaharlal was educated by Theosophists. He decided to join the Theosophical Society when he was thirteen and

56 Joshi, “Introduction,” xxx.

57 Jawaharlal Nehru, “A Class in Need of Help,” in Joshi, *The Middle Class in Colonial India*, 18.

58 Nehru, “A Class in Need of Help,” 20.

59 Annie Besant, *The Path of Discipleship: Four Lectures Delivered at the Twentieth Anniversary of the Theosophical Society, at Adyar, Madras, December 27, 28, 29 and 30, 1895*, 2nd ed. (London, New York, Benares: The Theosophical Publishing Society, 1899), 70.

60 Angelika Malinar, *The Bhagavadgītā: Doctrines and Contexts* (Cambridge: Cambridge University Press, 2007), 207.

61 See Chapter 13.9.

62 Mohandas Karamchand Gandhi, *Discourses on the Gita: Translated from the Original Gujarati*, Ahmedabad (Navajivan Trust, 1960), 62.

63 Also in the later editions, Monier-Williams does not include “fearlessness” as a standard translation. Monier Monier-Williams and Ernst Leumann, *A Sanskrit-English Dictionary: Etymologically and Philologically Arranged with Special References to Cognate Indo-European Languages* (1964), 60.

64 For Gandhi’s connection to Theosophy and his interest in Besant’s *Gita*, see Bergunder, “Experiments with Theosophical Truth”.

was initiated by Annie Besant herself.⁶⁵ Although this connection has often been discussed in research on the Theosophical Society,⁶⁶ a study that examines the connections between Theosophy and Nehru's biography remains a research desideratum. Even in the absence of such a study, Nehru's choice of terms remains an interesting case of a textual manifestation of hybridization processes and points towards the field of encounters described here.

5.4 Writing the Public Sphere: Journals, Magazines, and Public Speeches as Media for Encounters

When we talk about the Indian “middle class” in colonial India, the phrase does not usually refer to a middle stratum of society but to a “class” of mostly high-caste Hindus, as well as Muslims and Parsees, who belonged to the upper echelons of society. These individuals were often members of families that had traditionally been employed at the courts of the rulers and landlords of India. They thus possessed the necessary financial and, more importantly, educational backgrounds – which often meant being fluent in several languages, including English – to partake in India's colonial public life. As Joshi argues, the defining characteristic of the Indian middle class in pre-independence India was their “efforts of colonial entrepreneurship.”⁶⁷ By this, Joshi means that these individuals actively participated in the negotiation of values and the formation of an “Indian identity.” This activity was accompanied by the development of a public sphere, initially induced by the British but then accelerated and controlled by the Indian middle class. Many of the journals and newspapers published by members of the Indian middle class provided the backbone of the public sphere under British rule. It was through these channels that the middle class could communicate their ideas of India.⁶⁸ These structures made it possible to connect numerous actors in such a way that they could encounter each other. Theosophical journals such as *The Theosophist*, *The Indian Theosophist*, *The Central Hindu College Magazine*, and *New India* were all part of this field of

⁶⁵ Jawahrlal Nehru, *An Autobiography: With Musings on Recent Events in India* (London: John Lane the Bodley Head, 1938), 14–16; Jawahrlal Nehru, “India's Debt to Annie Besant,” in Cousins, *The Annie Besant Centenary Book*.

⁶⁶ Lubelsky, *Celestial India*, 259–60; Taylor, *Annie Besant*, 279, 296, 327; Nethercot, *The Last Four Lives of Annie Besant*, 76, 86, 251; Pécastaing-Boissière and Terrier, *Annie Besant*, 280, 295, 309, 311.

⁶⁷ Joshi, “Introduction,” xix.

⁶⁸ Joshi, “Introduction,” xviii–xx.

encounters. Many important members of the Indian middle class, and fellows of the Theosophical Societies, including figures such as Bhagavan Das, T. Subba Row, Mohini Chatterji, and Manilal Dvivedi, published in Theosophical journals alongside “Western” Theosophists and non-Theosophists. At the same time, Theosophists frequently published in journals issued, edited, and published by non-Theosophical members of the Indian middle class. This constituted a field of encounters in which processes of hybridity could take place.

5.5 The Indian Middle Class in the Global Colonial Discursive Continuum

Some of the topoi which emerged in this field were imported from “Western” discourses on the “middle classes” and “cultural identities.” They were then translated and repeated as part of a nationalistic narrative. This can be seen, for example, in Aurobindo Ghosh’s text (1872–1950, from 1893), originally published in the *Indu Prakash*, in which he discussed whether the Indian National Congress was indeed national. He stated that the congress did not represent “the mass of the population,”⁶⁹ but rather a certain class, the middle class. In Ghosh’s article, this label stands in for an Anglicized class of Indians who are, according to him, inauthentic.⁷⁰ Here we can see two important topoi which were frequently repeated in the discourse on the “Indian middle class”: 1) the question of representation, meaning that of the popular vs. the elite; and 2) the question of authenticity, which goes hand in hand with the first question because the “elites” were often seen as inauthentic and Anglicized. The same argument about inauthenticity was also discussed by British officials. Paradigmatic of this phenomenon is a speech given by Lord Dufferin in which he described what later became known as the Indian “middle class” – a term Dufferin himself avoided in his speech for political reasons, treading a careful line between acknowledging this group while not giving them too much weight⁷¹ – as “Europeanized native gentlemen”⁷² and a “microscopic minority.”⁷³ The term “Europeanized native gentlemen” can be read

69 Aurobindo Ghosh, “A Cheap Shoddy Import,” in Joshi, *The Middle Class in Colonial India*, 10.

70 Joshi, “Introduction,” xxvi–xxvii; Ghosh, “A Cheap Shoddy Import.”

71 Joshi, “Introduction,” xxiv.

72 The Marquis of Dufferin and Ava, “A Microscopic Minority,” in Joshi, *The Middle Class in Colonial India*, 4. In the original as “the Europeanized native gentleman” in contrast to “the naked savage hillman.”

73 Marquis of Dufferin and Ava, “A Microscopic Minority,” 7.

as a claim of inauthenticity. They are “native” and not “English,” but the “Europeanization” made them “gentlemen,” although only “Europeanized” examples of such and not true “English gentlemen.” The description of this group as only a “microscopic minority” seeks to delegitimize their claim to speak for Indians more broadly. A minority, Dufferin seems to imply, apparently with the English political system in mind, cannot claim authority in a system of majority decision making. In Lord Dufferin’s speech, these topoi were employed for a reason quite distinct to that which underpinned their use in Ghosh’s text. Ghosh wanted “less Britain” and authentic Indians who would govern the “Indian nation”; Dufferin, by contrast, wanted “more Britain” and more British rule and education for the “Indian subjects.” This field of discourse can be understood in terms of a constant de- and recontextualization of hybrid positions in an ongoing process of hybridization in which new or altered relations are constantly established and reestablished.

5.6 Preliminary Conclusion: Encounters in the Indian Middle Class

It is important to note that most of this entrepreneurship was inherently masculine and upper caste, although the language of modernity employed by the “cultural entrepreneurs” tried to cover up these inherited inequalities. In addition, most of the Indian middle-class narratives are “Hindu” narratives which tend to marginalize the roles played by Muslims, Parsees, Christians, and members of other religions. However, as noted earlier, the “middle class” was heterogeneous and in this heterogeneity religious, gender, and caste identities were negotiated⁷⁴ in multifaceted processes of adaptation, adoption, and demarcation. These processes led to numerous new or altered relations. As can be seen from the few examples given above, this colonial field of encounters opened up the possibility of both Indians and non-Indians engaging in an “Indian” discourse. The possibility of encounters initiates processes of hybridization.

As discussed above, the Theosophical Society played a significant role as a structure in many ways in the colonial field of encounters and can therefore be seen as part of the Indian Middle Class. Its members were actors in this “field of encounters.” Both the Theosophical Society as a structure and its members as actors were parts of a larger discursive field which I have identified as the (up-percase) “Indian Middle Class.” However, this is only one of the “fields” in which all of these actors were involved: While encountering each other, they at the same time made connections between a multitude of other discursive fields.

74 Joshi, “Introduction,” xxxvi–xliv.

Through the connections they established in these encounters, the actors were able to bring about new relations by translating certain elements (the topoi described above) and structures (media production). As a “hybridization process,” this translation repeated these “elements” and “structures” while simultaneously altering them. When thinking of the translation and repetition of the rationalist, classicist, and orientalist topoi described above, we can understand them as being brought into a) harmonizing and b) hierarchizing relations.⁷⁵

75 Two issues must be noted. 1) It is difficult to separate what I describe using the category of “movement” (see Chapter 4.6, “Systematization of Hybridization”) from what I describe using the category of “processes of hybridization.” For example, in the case of “translation,” “to translate” and “translation” imply, respectively, the “process of hybridization” and the “movement” of the elements that are subject to the “translation.” Hence, the whole process is implied when describing “movement” with the verb “to translate.” Likewise, when using “to repeat” as a verb for “movement,” Bhabha’s ideas of “mimicry” and “hybridization” in general are always simultaneously implied because “repetition” is key to his concept. 2) It is also difficult to maintain the differentiation between the levels of “structure” and “element.” This is not only because the terms for relationizing may apply at both levels, but also because the term “structure(s)” has been used in a different way above. I will return to these issues at the end of Chapter 8.