

ANANTAM IAS · OPTIONAL NOTES

History Optional Factors Leading to the Birth of Indian Nationalism

Paper 2 · Unit 8

Why Indian nationalism arose when it did, and the safety valve theory UPSC has now asked about twice in two years.

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UPSC SYLLABUS

Factors leading to the birth of Indian nationalism; politics of association; the foundation of the Indian National Congress; the safety valve thesis relating to the birth of the Congress; programmes and objectives of early Congress; the social composition of early Congress leadership; the Moderates and Extremists; the Partition of Bengal (1905); the Swadeshi Movement in Bengal; the economic and political aspects of the Swadeshi Movement; the beginning of revolutionary extremism in India.

The conditions that made nationalism possible

Begin with the material and institutional conditions rather than with the founding of Congress, because a question on the birth of nationalism is a question about causes and the Congress is a consequence.

- **Administrative unification** created for the first time a single legal, revenue and police system across the subcontinent, so a grievance in Madras and a grievance in Punjab could be described in the same vocabulary.
- **Railways, the telegraph and the postal system** made a genuinely all-India political organisation physically possible, and the Congress of 1885 could not have met without them.
- **English education**, following Macaulay's Minute of 1835 and the Wood's Despatch of 1854, produced a lawyer, journalist and teacher class that shared a language, read the same books and absorbed liberal and nationalist ideas from Europe.
- As an organiser the **press** was decisive: the *Hindoo Patriot*, *Amrita Bazar Patrika*, *The Hindu*, *Kesari* and *Maratha*, and the resentment created by the **Vernacular Press Act of 1878** which applied only to Indian language papers.
- **Economic critique** supplied the content. Naoroji, Ranade and Dutt gave nationalism an explanation of poverty that blamed policy rather than providence, which is the intellectual foundation of the whole movement.
- **Racial discrimination** politicised the educated class directly, through exclusion from the covenanted civil service, through the lowering of the ICS age limit in 1878, and above all through the **Ilbert Bill** controversy of 1883.
- Asked about in 2026, the **Ilbert Bill** proposed allowing Indian judges to try Europeans in the mofussil; the ferocious European agitation forced its dilution and taught Indians two lessons, that racial equality would not be conceded and that organised agitation worked.
- **Rediscovery of the past** through Orientalist scholarship, the work of the Asiatic Society, and figures such as Bankim Chandra and Vivekananda supplied cultural self-confidence, with the attendant risk of a Hindu-inflected nationalism that later became a fault line.
- **British political developments** mattered too: the extension of the franchise at home from 1867 and 1884, the rise of Gladstonian liberalism and the presence of sympathetic radicals such as Charles Bradlaugh gave Indian leaders a plausible audience in Parliament and a model of constitutional agitation to copy.
- Famine between 1876 and 1878, alongside the extravagance of the 1877 Delhi Durbar, held in its shadow gave the critique a moral edge that no amount of official statistics could answer.

KEY TERMS

Mofussil — The provincial districts outside the presidency towns, where the Ilbert Bill's proposed jurisdiction was most resented.

Politics of association — The pre-Congress phase of organised politics through regional bodies petitioning the state, rather than mass mobilisation.

The politics of association before 1885

Named explicitly in the syllabus. These bodies are the training ground and their limits explain why an all-India body became necessary.

- In Calcutta the **Landholders' Society** of 1838 and the **British Indian Association** of 1851 represented zamindari interests and petitioned on revenue and tenancy.
- Presidency counterparts followed in the **Madras Native Association** (1852) and the **Bombay Association** (1852), all three formed around the periodic renewal of the Company's charter.
- In London the **East India Association** was founded in 1866 by **Dadabhai Naoroji** to influence British opinion, which reflects the early strategy of appealing over the Government of India to Parliament.
- In western India the **Poona Sarvajanik Sabha** (1870) under **Ranade** and Ganesh Vasudev Joshi was the most effective of the regional bodies, conducting genuine social and economic inquiry.
- Founded by **Surendranath Banerjee** and Ananda Mohan Bose, the **Indian Association** of 1876 was the crucial bridge: it deliberately sought a wider membership than the zamindari bodies and organised an all-India campaign on the civil service age limit.
- Completing the network were the **Madras Mahajana Sabha** (1884) and the **Bombay Presidency Association** (1885) that the Congress then federated.
- Their common limitation was regional confinement and a membership drawn from the propertied and professional classes, which is why the Congress in 1885 is a change of scale rather than of kind.

The founding of the Congress and the safety valve thesis

Asked in 2025 on why the theory has been discredited and in 2026 through the Hume quotation. This is the single most reliably recurring question in the unit, so prepare it as a set piece.

- In December 1885 the **Indian National Congress** met for the first time at Gokuldas Tejpal Sanskrit College, Bombay, with seventy two delegates, **W. C. Bonnerjee** presiding and **A. O. Hume** as general secretary.
- According to the **safety valve theory**, Hume, a retired civil servant, founded the Congress with official encouragement to provide a harmless outlet for discontent and forestall a violent explosion.
- Its documentary basis is thin and traceable: **William Wedderburn's** 1913 biography of Hume, which reported Hume's claim to have seen secret reports of imminent unrest, and the later elaboration by **Lala Lajpat Rai** in *Young India* (1916), who used it to attack the Moderates.
- Adoption then came from opposite directions, by British writers to belittle the Congress and by Indian radicals to discredit the Moderate leadership, which explains its long life.

- **Bipan Chandra** and his co-authors demolished it in *India's Struggle for Independence*: no corroborating official document has been produced, the volumes of secret reports Hume described have never been found, and the initiative came from Indian political activity already under way through the associations.
- A stronger reading, which the 2025 question invites, reverses the arrow: **Hume was used by the Indian leadership** as a lightning conductor, since a retired British civil servant as convenor gave the new body protection from immediate suppression.
- For the 2026 quotation about a safety valve for growing Indian discontent, the correct answer is to state the theory, give its provenance in Wedderburn and Lajpat Rai, then explain why the evidence does not support it while conceding that Hume's own motives may well have included preventing revolution.
- One analytical point deserves the closing line: even if Hume's intention had been a safety valve, intention does not determine outcome, and the Congress rapidly became something its convenor did not control.

The Moderates: programme, method and achievement

Moderates are routinely dismissed in student answers, which is exactly the error examiners look for. Judge them by what was possible in the 1890s rather than by 1942 standards.

- Moderate leadership included **Dadabhai Naoroji, Surendranath Banerjee, Gopal Krishna Gokhale, Pherozeshah Mehta, Badruddin Tyabji, W. C. Bonnerjee and M. G. Ranade**.
- Their method was the **three Ps**, prayer, petition and protest, resting on faith in British justice and on the strategy of educating British public opinion, for which the British Committee of the Congress and the journal *India* were created in 1889.
- Demands were constitutional and economic: expansion of the legislative councils, simultaneous ICS examinations in India and Britain, separation of judicial and executive functions, reduction of military expenditure, and redress of the drain.
- Their **economic critique** was their greatest achievement, since Naoroji's drain theory, Ranade's case for industrial protection and Dutt's economic history together destroyed the moral case for British rule on its own terms.
- Concrete gains were modest but real, including the **Indian Councils Act of 1892** which introduced an indirect and limited elective principle, and the **Welby Commission** on Indian expenditure.
- Narrow **social composition** followed, overwhelmingly English-educated, urban, upper caste and professional, which is a legitimate criticism and one Congress itself recognised.
- Their failure was strategic: by the late 1890s it was clear that petitioning produced almost nothing, and the famines of 1896 to 1900 and the plague administration in Poona made patience look like complicity.
- The fair verdict to write: the Moderates built the institution, the economic argument and the all-India habit that made everything after 1905 possible, and their method exhausted itself precisely because it had succeeded in raising expectations it could not satisfy.

The social composition of early Congress leadership

The syllabus names this separately, which means it can be asked on its own. It is also the honest answer to why the early Congress could demand so much and mobilise so few.

- The 1885 session's seventy two delegates were overwhelmingly **lawyers, journalists, teachers and merchants**, with lawyers the single largest group, and the profession explains the movement's constitutional idiom.
- Delegates were drawn from the **presidency towns and a few provincial centres**, and the early sessions rotated between Bombay, Calcutta and Madras precisely because that was where the constituency lived.
- **Caste composition** was heavily upper caste, with Brahmins, Kayasthas and comparable literate service castes dominant in every province, reflecting who had taken to English education first.
- **Muslim participation** was low from the outset, though not absent, and Badruddin Tyabji's presidency in 1887 and Rahimtulla Sayani's in 1896 are the counter-evidence to any claim of total exclusion.
- **Women** were admitted from 1889, when Swarnakumari Devi and Kadambini Ganguly attended, and **Annie Besant** became the first woman president in 1917, but the leadership remained male into the Gandhian period.
- The **peasantry and industrial workers** were absent, and the early Congress explicitly avoided agrarian questions that would have divided its zamindar and professional supporters.
- **Social reform** was deliberately excluded from Congress business after 1895, when the National Social Conference was separated from it under pressure from Tilak, which kept the organisation together at the cost of leaving caste and gender untouched.
- The consequence to state: a leadership this narrow could articulate a national economic critique but could not deliver a national movement, and the transition to mass politics after 1917 required both new methods and a new social base.

KEY TERMS

National Social Conference — Ranade's body for social reform, separated from the Congress after 1895 so that political unity would not be broken by reform disputes.

The Extremists and the split

The 2024 paper asked whether political extremism converged with cultural nationalism, which is a question about the Extremists' intellectual character rather than their tactics.

- The Extremist leadership was **Lal, Bal, Pal**, meaning Lala Lajpat Rai, Bal Gangadhar Tilak and Bipin Chandra Pal, with **Aurobindo Ghosh** as the most systematic theorist.
- Their diagnosis was that British rule was not a benevolent system needing reform but a structure of exploitation requiring **swaraj**, and Tilak's formulation that swaraj is my birthright and I shall have it dates from 1916 but expresses the earlier position.
- Their method was **passive resistance, boycott, swadeshi and national education**, which shifted politics from petitioning to self-reliance and from the council chamber to the street.

- The **cultural nationalism** connection the 2024 question asks about is real and specific: Tilak's **Ganapati festival from 1893** and **Shivaji festival from 1895**, and Aurobindo's and Bankim's identification of the nation with the mother goddess.
- But the convergence was not total, which is the qualification the question invites. Tilak's use of Hindu symbols was instrumentally mobilising and had a communal cost, while Pal was a Brahmo and Aurobindo's nationalism was philosophical rather than sectarian, and Lajpat Rai's Arya Samaj background pulled differently again.
- The **Surat split of 1907** divided the Congress over the presidency and over the Extremist demand to keep the Swadeshi resolutions, and it left the Moderates in control of an organisation that had lost its energy.
- Government repression followed the split, with Tilak sentenced to six years' transportation in 1908 for sedition and Aurobindo withdrawing to Pondicherry in 1910.
- Reunification came at **Lucknow in 1916**, alongside the Congress-League pact, and the Home Rule Leagues of Tilak and Annie Besant carried the Extremist method into the mass phase.

The Partition of Bengal and the Swadeshi Movement

The 2024 paper asked whether Swadeshi anticipated Gandhian tactics, which it plainly did, and the value of the answer is in showing exactly which tactics and which did not carry over.

- **Curzon** announced the partition in 1905, dividing Bengal into a Hindu-majority west and a Muslim-majority east with Dacca as capital, on the stated ground of administrative convenience.
- The political ground was explicit in official correspondence: to divide the Bengali-speaking political class, which is why the measure was read as an attack on the nationalist movement rather than as administration.
- The movement passed through phases, beginning with moderate petition and the **16 October 1905** observance of mourning and rakhi bandhan organised by **Rabindranath Tagore**, then moving to boycott and swadeshi.
- **Boycott** of British goods, courts, schools and titles, and the promotion of **swadeshi** enterprise including Bengal Chemicals under P. C. Ray, were the movement's constructive core.
- **National education** produced the Bengal National College with Aurobindo as principal and the National Council of Education in 1906, and **samitis** such as the Anushilan and Swadesh Bandhab organised volunteers at village level.
- **Cultural mobilisation** was central, with Tagore's songs including Amar Sonar Bangla, later the national anthem of Bangladesh, and this fusion of culture and politics is the movement's most durable innovation.
- The tactics that anticipated Gandhi are boycott, swadeshi, national education, passive resistance, the use of volunteers and the fusion of cultural symbol with political demand.
- Equally important are the tactics that did not carry over: Swadeshi failed to reach the peasantry and the Muslim masses, its leadership remained upper caste and urban, and it had no equivalent of Gandhi's constructive programme or of satyagraha's disciplined non-violence.
- The partition was **annulled in 1911**, which was a real victory, but it came with the transfer of the capital to Delhi and after the movement had already fragmented.

The beginnings of revolutionary extremism

Named in the syllabus for this unit rather than the later one, so cover the early phase here and leave Bhagat Singh to the Other Strands unit.

- Revolutionary activity grew out of the Swadeshi samitis when the movement's failure convinced a section of youth that petitioning and boycott were both inadequate.
- In Bengal the **Anushilan Samiti** and **Jugantar** organised secret societies, and the **Alipore Bomb Case of 1908** following the Muzaffarpur attempt by **Khudiram Bose** and Prafulla Chaki brought the movement into public view.
- In Maharashtra the **Chapekar brothers** assassinated Rand and Ayerst in Poona in 1897 over plague administration, which precedes the Bengal activity and is often omitted.
- **Savarkar's** Abhinav Bharat and his *The Indian War of Independence 1857*, published in 1909, supplied the movement with a historical charter.
- Abroad, the **India House** in London under Shyamji Krishna Varma, **Madan Lal Dhingra's** assassination of Curzon Wylie in 1909, and the **Ghadar Party** founded in San Francisco in 1913 under Lala Har Dayal and Sohan Singh Bhakna extended the network.
- The **Delhi Conspiracy Case** following the 1912 attempt on Hardinge and the **Hindu-German Conspiracy** during the First World War show the ambition and the limits of the strategy.
- Repression followed through the **Explosives Act, the Newspapers Act of 1908, the Criminal Law Amendment Act of 1908 and the Press Act of 1911**, and later the Defence of India Act of 1915.
- The assessment to write: early revolutionary extremism failed militarily and organisationally, being penetrated by informers and lacking mass support, but it kept an alternative tradition alive, imposed real costs on the administration, and supplied a martyrology that the mass movement later drew on.

The Muslim League and the other consequence of 1905

Partition and Swadeshi also produced the League, and an answer that omits this misses half the consequence. Keep it brief and factual.

- The **Simla Deputation of October 1906**, led by the Aga Khan to Minto, sought separate representation for Muslims, and the **All India Muslim League** was founded at Dacca in December 1906.
- **Separate electorates** were conceded in the **Morley-Minto reforms of 1909**, which is the single most consequential constitutional decision of the period because it institutionalised religious community as a political category.
- The Swadeshi movement's Hindu religious idiom, and the fact that partition benefited eastern Bengali Muslim cultivators against largely Hindu landlords, gave the League a genuine constituency rather than a purely manufactured one.
- **Sir Syed Ahmad Khan's** earlier position, that Muslims should keep out of Congress politics and concentrate on education and loyalty, prepared the ground, and the Aligarh movement supplied the leadership.
- The countercurrent existed and should be named: **Badruddin Tyabji** presided over the Congress in 1887, and the **Lucknow Pact of 1916** showed that Congress-League cooperation was possible.

- Annulment of the **partition of Bengal in 1911 came without consulting the League**, which convinced its leadership that loyalty earned nothing, and that disillusion is part of why the League moved towards the Lucknow Pact of 1916.
- The historiographical caution: separate electorates were a British concession as much as a Muslim demand, and treating the League's formation as the inevitable start of partition reads history backwards from 1947.

Last-mile revision

- Conditions: administrative unification, railways and telegraph, English education, press, economic critique, racial discrimination, Ilbert Bill 1883, 1876-78 famine and 1877 Durbar.
- Associations: Landholders 1838, British Indian 1851, East India Association London 1866, Poona Sarvajanik Sabha 1870, Indian Association 1876, Madras Mahajana Sabha 1884.
- Congress founded December 1885, Bombay, 72 delegates, W. C. Bonnerjee president, Hume general secretary.
- Safety valve: Wedderburn 1913 and Lajpat Rai 1916 are the source; Bipan Chandra's refutation; the lightning conductor reading reverses it.
- Moderates: three Ps, British Committee and India 1889, Indian Councils Act 1892, Welby Commission.
- Extremists: Lal Bal Pal and Aurobindo; Ganapati 1893 and Shivaji 1895 festivals; Surat split 1907; Tilak transported 1908; reunion Lucknow 1916.
- Swadeshi: partition 1905, 16 October mourning and rakhi, boycott, national education, Bengal National College, samitis, annulled 1911.
- Revolutionaries: Chapekar 1897, Khudiram and Alipore 1908, Savarkar 1909, India House, Ghadar 1913, Delhi Conspiracy 1912.
- League: Simla Deputation October 1906, League founded Dacca December 1906, separate electorates in Morley-Minto 1909.

Common errors to avoid

- Presenting the safety valve theory as fact. Its provenance is Wedderburn and Lajpat Rai and no corroborating document has ever surfaced.
- Dismissing the Moderates. They built the institution and the economic critique, and their method failed because it succeeded in raising expectations.
- Treating Extremism as simply Hindu revivalism. Tilak's festivals support the claim, but Pal, Aurobindo and Lajpat Rai complicate it.
- Saying Swadeshi anticipated Gandhi without naming what it lacked: peasant and Muslim participation, a constructive programme, and disciplined non-violence.
- Dating the first revolutionary act to Bengal. The Chapekar assassinations in Poona in 1897 precede it.
- Forgetting that separate electorates were a British concession as well as a Muslim demand.

Why has the 'safety valve theory' related to the foundation of the Indian National Congress been thoroughly discredited by recent researchers?

20 marks · 250 words · 2025

Political extremism in colonial India often converged with cultural nationalism, but not always. Comment.

20 marks · 250 words · 2024

The Swadeshi movement of 1905 anticipated many of the tactics later developed during the Gandhian mass movement. Critically examine.

20 marks · 250 words · 2024

“No educated Indian has ever forgotten the lesson of the Ilbert Bill.”

10 marks · 150 words · 2026

Alan Hume's ultimate aim in encouraging the foundation of the Indian National Congress was to provide a 'safety valve' for the release of growing Indian discontent.

10 marks · 150 words · 2026

“In my belief, Congress is tottering to its fall and one of my great ambitions in India is to assist it to a peaceful demise.” Comment.

10 marks · 150 words · 2026