# The Capabilities Approach in the Vernacular: The History in Kerala



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The conjoining of capacities and ability, first suggested in missionary and allied discourses, soon became fundamental to the project of Travancorean nationalism in the late 19th century through its unique nationalist developmentalism, and was taken forward by emergent communities in their negotiations with the modernising state. However, even as new avenues were opened through new capabilities, the resources, skills, and dispositions of many lower caste groups were eroded. The abilities offered to them by the state did not often match their valued dispositions, skills and knowledge. At the same time, as Kerala's gender paradox suggests, the provision of abilities to women by the state has, more often than not, exacerbated gender divisions and inequalities.

My warmest thanks to Joseph Tharamangalam and M A Oommen for encouraging me to contribute to their ongoing project on "Lessons in Human Development: A Comparative Study of Kerala and Cuba", and for useful discussions. A different version of this essay will appear in the volume based on that project.

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> When the assets of a particular people shrink, their numbers will also necessarily decline. The poor will not have the same ability (*praapti*) to raise children as the rich. Though it must be admitted that those pretty women who lead frivolous lives will not have the same capacity (*patrata*) to bear children as the women who lead dutiful lives in labour appropriate to their kind, there is no doubt that this capacity (*patrata*) will be mostly low in women who do not possess the means to secure adequate physical nourishment. While the poor are not lacking in the capacity (*patrata*) to produce offspring, raising children is a costly business, so they lack ability (*praapti*) for this, unlike the rich.
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> (Anon 1866: 343)[1]

The remark above comes from a missionary from the Church Missionary Society (CMS), who was stationed in the erstwhile Travancore state. The target of his criticism was the matrilineal family norm widespread in Kerala in the 19th century. The recurring terms in the quote, *praapti* (ability) and *patrata* (capacity) are important. Poverty, the author argues, may deny desired ends (in this case, healthy procreation) to those who have capacity since they lack praapti. This can hamper the capacity itself – lack of praapti can erode existing patrata. Moral capacities by themselves cannot deliver desired ends: *praapti* must necessarily be present. Thus desired ends are achieved when praapti and patrata foster each other; one may not be privileged over the other.

This paper attempts to trace what may be called the vernacular antecedent of Sen's capability approach,[2] and use it as a prism to view the vicissitudes of the historical trajectories of different social groups in Malayalee society in the 19th and 20th centuries. The missionary's remark advances a notion of "capability" as essentially a combination of capacity and access to resources and ability. Biological capacity and moral diligence constitute the capacity for procreation. The lack of ability – of resources – aborts the achievement of desired ends. Capability, then, requires both. The concern for capabilities and human well-being in Kerala is neither recent nor exclusively imported from contemporary development discourse. Nevertheless, the specificity of the context that ensured the success of the strategy is crucial. This vernacular antecedent is close to Martha Nussbaum's elaboration that stresses the difference between "internal" and "combined" capabilities (Nussbaum 1998).

At the outset, one may note that for the missionary, capacity has biological and non-biological elements. It includes (gendered) moral diligence, which is as or more important than biological capacity. In late 19th reformist discourse, such diligence was understood as stemming from a disposition with biological foundations, but which had to be "hollowed out" into an internally focused modern self with specific instruments of self-development to

produce the ideally gendered subject[3] – the "ideal woman". Such concerns were gaining ground through state-supported formal schooling in Travancore and Cochin, and informal pedagogy in nascent civil social institutions and the emergent public sphere (Devika 2007). The shaping of productive capacities in the internally focused individual consciousness was prescribed as a means towards the end of creating an ideal society in which human beings would be valued for their essential, internal qualities. Capacities were viewed as necessarily requiring social nurture. The claim was that human capacities, even when carefully hollowed out of primary dispositions, would wither in the absence of adequate facilities for nurture. Thus the "properly feminine" but undernourished woman could not be a good procreator. Desirable capacities were of course constructed through standards derived from strictly Victorian social and gender norms.

Late 19th century Malayali society, especially in Travancore, was in the throes of intense change. Certain communities, including the underprivileged Ezhavas, were making substantial economic gains from the ongoing integration of the local economy with the capitalist world-system. The modern educated new elite were being heard in the nascent public sphere and in modern politics (Jeffrey 1976). Many social groups in Travancore had begun to demand that the state provide to them facilities for deepening capacities and bolstering abilities. Recent work argues against positing a dichotomy between the state and civil social actors in furthering democratisation and the spread of welfare in Travancore. Manali Desai identifies a form of "interaction between state formation and social resistance" unique to Travancore (2005: 462-64):

> [T]he Travancore state acted in self-preserving ways under pressure from the British and the fear of instability from the lower orders…The relatively radical character of the Travancore state's policies within this unequal and hierarchical context had the unintended consequence of spurring more rather than less resistance. This is because it created new and evolving notions of citizenship which communists later drew upon for popular mobilisation.

This essay will reflect on two issues: first, how capability-building came to be perceived as the core of welfarism in Kerala. The existing literature throws considerable light on the early start of welfarist policy and public action here. Rather than retrace this general story or rehearse the debates around structure and agency in the Kerala model of development, it may be profitable to ask how the responsibility attributed to the state towards facilitating capacities and abilities among its population became vital to hegemonic understandings of development and social progress in Travancore and later, Kerala. Certain groups have been identified as "outliers" to the Kerala model's "central tendency" (Sivanandan 1976; Kurien 2000). The "gender paradox" of the Kerala model, i e, women being part of the central tendency in some ways, but grievously excluded in other ways, is also recognised now (Mukhopadhyay 2007).

The second issue of concern is the shaping of the specific pattern of the distribution of gains from development. Since the Kerala model's antecedents are found most clearly in Travancore, most of the discussion of the late 19th and early 20th century will pertain to that region.

## 1 Developmentalism, Capability-Building and the Missionary Project

The socio-economic and political ferment of 19th century Travancore produced a certain developmentalism that became hegemonic in the 20th century,[4] in which adjoined patrata and praapti were fundamental elements. It took shape in and through complex, contingent interactions between the many forces at play in the princely state of Travancore in the 19th century. There was, first, the crisis-ridden Hindu state of Travancore, under constant political and economic pressure from the colonial power (Kawashima 1998; Kooiman 1989). Second, there were the missionaries who entered Travancore and established themselves (Yesudas 1975). Third, there were the emergent community-building interests, which thrived on the integration of Travancore's economy with the capitalist world-system. Fourth, modern educated classes employed in emergent governmental, civic, and educational institutions, exerted pressures on Travancore state (Jeffrey 2003; Kooiman 1989). Travancorean developmentalism was forged at the interaction of these diverse forces.

The legitimacy of the Travancore state was pinned on its claims of being a "Hindu kingdom". However, the interplay of the forces mentioned above raised a serious challenge to the traditional hierarchical order of caste, which the Hindu kingdom was expected to defend. The "breast-cloth disturbances" of south Travancore (Yesudas 1980), caused much embarrassment to Travancore state between the 1820s and 1860s. The middle decades of the 19th century, however, saw the re-establishment of the legitimacy of the Hindu state through the expansion of a modern biopolitical network and the promotion of new techniques of the self, which refurbished the state's traditional claims to being *Dharmarajyam* (or land of charity). The technologies of government to be deployed for this purpose would be adapted from the missionaries.

The missionaries of the London Missionary Society (LMS) and the CMS were establishing themselves in Travancore early in the 19th century with British support (Nellimukal 2003; Kooiman 1989). Missionaries were clear that for the faith to grow in this society, new kinds of patrata and praapti, both, had to be created. Protestant Christianity was not merely a belief but also a gendered lifestyle which idealised the north-western European family form as Christian and "civilised" (Thornton 2001). While the missionaries were willing to undertake the labour of hollowing out patrata, praapti would have to come from mentors, most importantly, the state. The missionaries, for instance, did not find the natives "disposed" towards modern education; nor did they possess the ability for it. They were determined to hollow out such capacity, but needed the state to provide the natives with ability by supplying schoolbooks and facilities, as the early LMS missionary W T Ringeltaube remarked to Munro in 1813 (Agur 1905: 174).[5]

The capability thus generated could bring considerable gains under emerging conditions. Forced labour had been abolished; demand for labour from expanded commercial cultivation and

the new department of public works was high (Kabir 2003: 118). As contemporary observers remarked, converts enjoyed much greater physical mobility (Panikkar 1900: 175).[6] By the mid-19th century, many lower-caste Chanar converts educated by the LMS migrated to Ceylon and Malaya; their incomes and social influence rose (Kooiman 1989; Yesudas 1980).

But perhaps the most crucial condition that allowed the conjoining of patrata and praapti to produce crucial capabilities was the lower castes' very visible desire to escape the hierarchies of caste. There is ample evidence to show that the Chanars used the missionary's influence mainly as a means to address temporal questions and were certainly not passive objects of the "civilising mission".[7] The desire to escape upper-caste exploitation was rampantly evident in Travancore in early 18th century and even earlier, in the 16th century.[8] In late 19th century Malabar, lower-caste people converted to Islam in large numbers (Panikkar 2001: 52). Unlike the Protestant missionaries of south Travancore, the rural Mappilas of 19th century Malabar were a highly disadvantaged community that could offer no material advantages to converts (Varghese 1970), except greater mobility (Panikkar 1900: 172). In other words, there is historical evidence that the disposition to escape caste restrictions existed before missionary intervention in Kerala. Missionary efforts deepened this disposition into a capacity by strengthening the modern, internally focused self and securing it with new abilities from the state.

Such capacity generation blended seamlessly with proselytisation, employing similar techniques of the self. As the eminent LMS missionary Charles Mead wrote in 1844 (Agur 1905: 458):

> We have no reason to regret the exertions we have made, and are still making, in the cause of native education. Without this branch of our work, preaching would not be practicable in many places.

As the history of publishing and printing technology in Kerala reveals, the development of reading was considered fundamental to the achievement of missionary goals in Kerala (Nellimukal 2003; Raghaviah 1990). Precisely because converts faced the risk of ostracism, missionaries were keen on expanding their life-options by introducing a variety of trades, crafts, and skills for converts (Raghaviah 1990). In 1854, a missionary of the Basel Mission wrote: "[E]ven acquisition of working capacity and loyalty has a missionising influence on human nature" (Raghaviah 1990: 10).

Also, capacities for new forms of domestic and childcare arrangements were being shaped. Older matrilineal forms were derided because they were both offensive to Christianity, and because they came in the way of creating new kinds of patrata deemed necessary for "enlightened" modern life (Anon 1866). Creating gendered capacities in individuals to produce ideally gendered subjects was central to this project (Devika 2007). As they worked at creating capacity for new roles, responsibilities, attainments, and skills, the missionaries also sought support from the Travancore government through the British Resident, to secure tangible gains for converts in south Travancore (Kooiman 1989). This enabled real capabilities.

The coming together of the missionary project and the modernising state and its importance in making available adjoined capacities and abilities to the masses cannot be stressed more. Though it was reluctant at first (Kusuman 1973), the princely state's efforts to refurbish its authority in the late 19th century extended adjoined capacities and abilities to ever-greater sections of the population. The history of popular mobilisation in early 19th century south Travancore does reveal that the generation of capacity for well-being from anti-caste dispositions did not, by itself, ensure ability. There were fairly similar alternatives to the LMS in south Travancore equally or more intensely rooted in the project of creating new capacities, which however, generated no praapti. An example was the powerful anti-caste Vaikunta Swamy cult, which however, was strongly critical of the Travancore kingdom as the defender of the caste order (Pandian 1992).

Clearly, the missionaries' project gained from the support of the paramount power in the first half of the 19th century. But it would gain wider purchase through its secularisation and adaptation to the Travancore kingdom's attempt to modernise its instruments of power and sources of legitimacy. The missionary project of mass conversions and the modernising Travancore kingdom's project of expanding infrastructural state power mirrored each other in many ways. The contrast offered by the experience of the Basel Mission in Malabar confirms this. The Basel Mission also introduced printing and publishing in Malabar; British officials were supportive of the mission in the 19th century (Raghavaih 1990: 14, 48). However, the Calvinist Basel Mission stressed individual, not mass, conversion, and British rule in Malabar did not call for the expansion of the infrastructural state. Not surprisingly, the mission's influence in Malabar remained strictly limited. In Travancore, the spread of modern government required a mass approach. The fruitful collaboration between missionaries and the state in education and health was, therefore, no coincidence.

By the 1860s, Travancore had embarked on modernisation under T Madhava Rao (1858-72). The *Travancore State Manual* (1906) said that "[he] brought sunshine into a land covered with darkness" and "secured the blessings of good government to a people harassed by anarchy" (Aiya 1906: 557).[9] The transposition of missionary language into the state's discourse is evident in the *Administrative Report* of Travancore for 1865-66 (Government of Travancore nd):

> The Sircar is not wanting in a sense of the importance of popular education; the labourers in the field, masters and pupils, are working with conspicuous zeal; the intellectual stagnation of centuries already feels a wholesome disturbance; an enquiring spirit seems to have been awakened; and there is reason to hope for increasing results every year.

Budgetary allocations to education increased steadily from 0.58% in 1862-63 to 5.34% by the end of the century (Kabir 2003: 119-20). Opening the new civil hospital in Thiruvananthapuram, the Maharajah clearly hinted that such acts would refurbish the traditional authority of the ruler (Government of Travancore nd: 61):

> For time out of mind, charity has been regarded by Travancore as one of the cardinal duties of the State. Its reputation as Dhurma Raj is familiar to all India. What can be more real, more substantial charity, than the provision of means for the relief or mitigation of sickness and disease!

Scholars have pointed out that the Travancore government continued to honour its role as a Hindu state, by ensuring that this expansion of the government network did not, as far as

possible, disturb traditional caste order. However, economic change towards commercialisation and the setting up of a concomitant institutional framework were facilitating the rise of a new middle class that sought new capacities and fervently hoped for recognition as industrious subjects from Travancore state. This new elite was a section of the traditional elite, Syrian Christians and the lower-caste Ezhavas, who had benefited from these processes. The educated elite of these groups were trying to transform their caste identities into community identities and advance their claims as loyal, industrious wealth producers.

In the early 20th century, pressure from these groups seemed to be working. It appeared that slowly, Travancore state was watering down its role as the guardian of caste hierarchies. For example, government schools in Travancore did not admit lower caste pupils initially. The Ezhavas and Pulayas had to go to missionary schools (Padmanabhan 2009). Well-off Ezhavas arranged for private tuition for their children (Kabir 2003 : 120).

In 1872, lower-caste Ezhava students were admitted to the Maharajah's School. But the strategy was to start special schools for them. These increased from 15 in 1895 to 30 in 1897 (Kabir 2003: 126). The policy worked very well, and its success indicates the demand for new capabilities. Enrolment in lower-caste special schools rose from 20,400 in 1894-95 to 43,580 in 1904 (Kabir 2003: 127). In 1906-07, the government declared government schools open to Ezhavas and to all castes by 1912. The numbers of Ezhava students in schools rose from 23,383 in 1914 to 51,114 in 1918. The numbers of students of the former "slave-caste", the Pulayas, rose from 2000 in 1916 to 17,753 in 1917 (Kabir 2003 : 127).

Similarly, Pulayas were excluded from government hospitals in Travancore in the late 19th century, while missionary hospitals were open to them. However, by the early 20th century, Pulayas petitioned the government seeking admission to the General Hospital, and the Darbar Physician wrote to the government seeking facilities for lower castes (Kabir 2003: 146). However real restrictions on the entry of the lowest castes into government schools continued for much longer (Padmanabhan 2009), as Ayyan Kali, the Pulaya leader pointed out in a 1916 speech demanding access to better educational facilities and entry into government schools for Pulaya children (Kali 2000: 809-11). Government efforts to improve access to education for Pulayas accelerated in Cochin, after 1919, and several concessions, including books and clothes and a provision for a mid-day meal were granted (Padmanabhan 2009).

Along with this shift, we find more frequent evocations of what may be called Travancorean developmentalism, the new ideology of emergent nationalism in Travancore. Central to it was the conception of an ideal relation between individuals and the collectivity in which the individual is implicated through productive contribution, a *positive* link. The progress of the nation is imagined to proceed through the mutual energising of expanded capacities of subjects and the provision of abilities by the government.

Travancorean developmentalism proved very useful in the efforts of upwardly mobile social groups who were not upper-caste Hindus. Processes of community formation were deeply informed by the logic of this specific late 19th century developmentalism and were no simple reassertions of primordial ties or defined by an insulated inner space.[10] The Syrian Christians even projected such developmentalism as an "ancient Kerala tradition" by which they had been welcomed into Kerala by the Hindu kings who valued their industrious nature (Joseph 1936). The two major memorials submitted to Travancore state, the Malayali Memorial (1891) and the Ezhava Memorial (1896) stressed the value of Nairs and Ezhavas as subjects with useful capacities, desirous of becoming industrious citizens (Jeffrey 1976: 170, 206-07).

If, for the lower castes, modern education meant acquiring new capabilities and life-options, for the upper castes, it was often a way of expanding their existing socio-economic power. This is apparent in the following observation by a teacher in 1864 about the responses to an essay question on the benefits of modern education in the CMS school at Kottayam, where pupils were largely upper caste:

> I was much amused to find that with scarcely an exception of these little lads, for most of them are about 10 to 12 years of age, described the chief advantage of education as arising from the fact that it was the key to honour, wealth and power. They saw that they are thus enabled to converse with Europeans without shame and embarrassment, they can obtain good situations, which are often the roads to wealth, always to honour amongst their countrymen.[11]

He then regretted that the moral value of education as a force in shaping virtuous character was rarely being perceived.

Certainly, the acquisition of new capabilities by upper castes did involve the transformation of their established ways of life, including the transformation of family ties and intimate relations. Yet it also added to their caste power, which was being steadily secularised (Pandian 2002). Demands for the expansion of education and healthcare, financial assistance for industries, facilities for industrial training and so on were voiced in the public sphere (Rammohan 1996: 266-67; Kabir 2003: 148-50). However, by the 1920s, tensions between the Travancore kingdom's self-identification as Hindu, and the interests of lower caste and non-Hindu communities which drew upon Travancorean developmentalism to advance demands, reached breaking point (Kooiman 2002: 19; Ouwerkerk 1994).

Nevertheless, the gains achieved were undisturbed and extended. Primary schooling was made free for all communities after 1908; dalit students in middle school were exempted from fees in 1920; full fee concession was offered to girls of backward communities in 1925; in 1932, half-fee concession was offered to girl students from the general communities (Kabir 2003: 127-28). Manali Desai (2005: 483) sums up the processes ongoing in early 20th century Travancore well:

> The infrastructural penetration of state power in Travancore, arguably more far-reaching than in most directly ruled British provinces also meant that the state's role in mediating entitlement inequalities was considered a fundamental basis for claims-making by various groups. This entailed new concepts of citizenship that were simultaneously vertical (oriented towards the state) and horizontal (what has been called civic associationism).

## 2 Outliers and Claim-Making

However, the late 19th century saw not only the spread of modern capabilities, but also the erosion of the resources, dispositions, and skills possessed of many lower-caste groups, many of which

had the potential to be developed into full-fledged capacities by the groups that valued them. The present-day "outliers" of the Kerala model are people who valued other capabilities as well, some of which were not fully receptive to colonial penetration and expanding capitalism. These groups failed to amass enough political and economic clout to pressurise the government to listen to their claims. The Travancore government's attempts at industrial development often led to local people's loss of access to traditional livelihood resources and the gradual erosion of their skills.[12] Trapped as it was in a subordinate position with the colonial framework, the Travancore government sometimes suffered considerable losses in these ventures; however, the losses of local people rarely entered the government's considerations (Rammohan 1996: 104).

Interestingly, the capacities for agriculture, especially rice-farming, possessed by Kerala's most disempowered dalit communities, were never really acknowledged as dispositions that could be "hollowed" and transformed into capabilities through the addition of abilities by the state. The fear that if children of the ex-slave communities received modern education, few would be left to labour in the fields, was very much present in Travancore, and this was alluded to by the Pulaya leader Ayyan Kali in his speech in the Travancore Sree Mulam Praja Sabha in 1916 (Kali 2000: 810). Pulaya labour was considered indispensable; yet it did not qualify to be treated as a disposition worth hollowing, in the manner the anti-caste disposition was, even when there was direct evidence that revealed a keen interest among the Pulayas to develop it into a full-fledged capacity and conjoin it with ability.

Ayyan Kali's first speech, in 1912, raised precisely this issue: he pointed out how the Pulayas were keenly recovering wastelands but were being driven out of these lands by upper-caste farmers and landlords with the active support of the bureaucracy. He appealed to the Travancore government to provide better support to the Pulayas in their efforts to become independent farmers (Kali 2000:809). He also made repeated requests for training in "science, agriculture, and industry" for Pulaya teachers, and the inclusion of agronomy in the curriculum for the Pulayas (Chentharaseri 1991). These suggestions clearly indicate that representatives of people who actually worked on the land did value their existing dispositions and skills, and were eager to respond to emerging market opportunities.

Elites, however, were not inclined to think so. This disinclination is revealed early on, in a speech of the first prince of Travancore (Varma 1874). There is a striking contrast between the way the speaker conceives of the labour of the Pulayas, and that of the capitalist farmers he hails as "industrious subjects". The prince praised the "example" of the Pulaya labour which reclaimed the backwaters for paddy cultivation in Travancore, comparing it, however, with that of the "hill-squirrels in our menagerie, which ceaselessly scramble over the revolving barrels in their cages" (Varma 1874: 2). He then lauds two enterprising rags-to-riches farmers (one of whom was P D Devasahayam, an LMS-educated Chanar convert). Clearly, the latter are valued as purposeful and productive labour, while the former is not.

The heavy reliance on dalit skills for agriculture throughout Kerala continued to be acknowledged in the 1930s. The 1931 *Census of Tra*vancore even hinted that non-dalit farmers lacked both the disposition and skills for agricultural activity (Kannan 1988: 47). Kannan remarks that these observations could easily be extended to Cochin and Malabar.

Such devaluations of potential capacities were carried into the 20th century, when Travancorean developmentalism was reshaped by the communist intellectuals of the late 1930s and after. Many lower- and middle-level leaders of the Congress Socialist Party and later, the Communist Party had been exposed to community reformism and had imbibed the ideal of human flourishing as the result of conjoined patrata and praapti. They did not reject Travancorean developmentalism but reworked it within Marxist historical materialism. This was "egalitarian developmentalism", shaped by elements from both Travancorean developmentalism and Marxist notions of development.[13] The influence of the former was palpable in the thrust on the vast expansion of state infrastructure in education and healthcare, fuelled by public demand from below (Kabir 2003: 148-50; Jeffrey 2003).

Certain interrelated elements of egalitarian developmentalism relevant to the present discussion are worth noting. First, Marxist teleology deeply informed the connections formed in egalitarian developmentalist writings between capability-forming, socio-economic equality, and class position. Second, egalitarian developmentalism often sought to bridge the Marxist notion of development and indigenous developmentalism. For instance, large-scale industrialisation was recommended both for furthering class struggle and as the solution to underutilisation of the capacities of educated people in Kerala. Writing in 1956 about the Second Five-Year Plan, E M S Namboodiripad welcomed its thrust on large-scale industrialisation but criticised it as incapable of generating enough employment. For Kerala, he remarked, the thrust should be on employment generation (Namboodiripad 1956: 8). Third, within the egalitarian developmentalist framework, the capable subject's positive link to the collectivity was envisaged as increasing not merely wealth and material production, but also his active participation in radical political struggle as defined by the communists.

Thus, as early as the 1930s, E M S Namboodiripad recommended substantial expansion of the access of dalit labourers to what are now recognised as basic capabilities. But he ignored the possibilities of their existing dispositions and skills. This was clearly because (1) they appeared "less advanced" – less than the proletariat – within the Marxist notion of progress, and (2) it appeared strategically unwise to support their claims (Namboodiripad 1937: 221).[14]

Namboodiripad recommended a mix of measures to ensure their "advancement" into a full-fledged proletariat, and the creation of conditions for the hollowing of anti-caste dispositions, modern schooling and healthcare (Namboodiripad 1935: 206-07).[15] This perspective informed the land reforms of the 1970s, in which the landless labourers mainly gained house plots, which did enhance their well-being but did not deepen their disposition towards agriculture into a full-fledged capability. In the 1980s, the Commission on the Socio-economic Condition of the SC and ST in

Kerala pointed out that these groups were "the backbone of agriculture", but had neither scientific knowledge nor land, and were exposed to the risk of being displaced by new technology because "[e]ven the Land Reforms Act has extended very marginal help to them" (Commission 1982: 47).

In the case of the fishing community, unlike in agricultural lands where farmers' supervisory skill could eclipse the claims of those who worked the land, there were few supervising upper-caste folk who could lay claim on marine resources. The state, therefore, was more willing to work directly with fisherfolk to develop fisheries and advocate a more "balanced capitalism". The Travancore government was keen to expand Travancore fisheries, building on the experience and skills of the fisherfolk in the 1940s, as John Kurien points out (1985: 8). However, these plans capsised under the combined impact of the technocratic, crudely growth-oriented policy environment in the fisheries sector and the sudden upswing of capitalist interest there, with the Indo-Norwegian technical assistance project working as a catalyst (Kurien 1985). The result was a complete devaluation of fisherfolk's skills and abilities. However, unlike the dalits, whose integration into the left political fold was contingent upon the sacrifice of their political and economic interests at the altar of historical materialism, the fisherfolk who confronted an exploitative merchant capitalist class, did organise independently as fisherfolk and fight back, with limited successes, in the 1980s (Kurien 1985).

The case of tribal decline shares striking commonalities and differences with the above cases. Tribal land was coveted by metropolitan planters first, and then local one since the mid-19th century. Here, tragically, the dispositions, knowledge, and skills of tribal people were deployed to deepen precisely their subjection to state surveillance. In his *Report on the Forests of Travancore*, T F Bourdillon (1893) remarked that the hill-tribes are very "useful" in penetrating the forests. For this useful labour to remain permanently available, he recommended that the names and ages of all tribal men in the reserve forest area should be registered, and the state should also insist that the tribals place themselves under the forest department and carry out its orders. The denial of tribals' access to traditional livelihood accompanied such state surveillance. Strict rules were enforced about tribal peoples' agricultural activities within reserve forests in the 19th century; in the 20th century, their right to cultivation was either removed or made conditional (Pillai 1940: 665).

In the 20th century, economic and political crises forced large numbers of agriculturalists from the plains to migrate first to the hill-lands of Travancore, and then to those of Malabar (Varghese 2006). The public debate on migrant farming in the hills between the 1920s and the 1980s largely privileged capacities functional to commercial farming – and importantly, in the 1960s, national interest – as worthy of transformation into capabilities. At the same stroke, it disenfranchised the tribal people, in effect derecognising their capacities for ecologically sustainable livelihoods. Here again, the civilisational discourse played a role, especially in the 1960s (Varghese 2006: 160). A Marxist version of this discourse underlay the support of communists to migrant farmers and their relative neglect of tribal interests: the latter, associated with "primitive communism", must be integrated into the churning of the forces of production or perish. The result was massive erosion in the material and moral resources of tribal people.

These disadvantages persisted through the late 20th century. It has been observed that homestead land gained in the land reforms helped dalit agricultural labourers to bargain for better wages, working hours, better basic education, healthcare, pensions, etc. However, observers also point out that the operation of market forces ensured that much of these gains were lost in subsequent decades (Tharakan 2002: 358-59).

Dalits, whose community-based educational ventures seem to have either died due to lack of resources or were actually thwarted by upper-caste hubris, were heavily dependent on public education. Vigorous efforts had indeed been made since the 1950s to improve dalits' and adivasis' access to modern education; dalits were relatively better represented among school-teachers in government schools (Padmanabhan 2009: 17). However, their success rates and ability to compete with candidates from better-endowed communities have remained poor (Sivanandan 1976: 21; Padmanabhan 2009). Though reservation policies were in place in government employment, both the number of reserved posts and the actual number filled were much lower than the minimum quota prescribed (Sivanandan 1976: 26). A dalit middle class was still weakly formed here in the early 1990s (Deshpande 2000). Dalits and adivasis could not take advantage of emergent opportunities in the global labour market (Zachariah et al 2002: 11, 26, 176-78).

Thus the provision of abilities by the state in the form of public education and other welfare entitlements to the present outlier groups could not bridge the gap in well-being. The state's historical non-recognition of the pre-existing dispositions of these groups has cost them dear. The provision of basic capabilities – education and health – was certainly important, desired, and valuable. But this could not make up for the loss entailed by non-recognition of the diverse needs and initial conditions of different social groups.

Mainstream opposition to recent land struggles by adivasis and dalits (Bijoy and Raman 2003) has often argued that land in Kerala is no more a productive resource, and that the dalits and adivasis no longer possess the capacity to which land could be joined to generate productive results. Sympathetic observers (Tharakan 2002) have suggested that local self-governments be the vehicles through which capacities and abilities may be created and conjoined anew among present-day outlier groups. It remains important to recognise that valued capacities and abilities are not the same across and within (internally heterogeneous) social categories; nor are they static. Adivasi claims to landed resources need not be tied to claims of capacities functional to capitalist production; nor do they need to any longer be necessarily divorced from capabilities usable in the global labour market. However, despite shifts in the letter of national policy and political decentralisation, the homogenising imperatives implicit in the politics of reducing marginal groups to governmental categories, encouraged by both political parties and the bureaucracy blocks complex solutions.

## 3 Gender Paradox

Recent writing on human development in Kerala has tended to admit the existence of a "gender paradox" in the generation of capabilities and their conversion into desired states. This is a blot on Kerala's human development record (Centre for Development Studies (CDS) 2005; Tharakan 2006). Women in Kerala, it is widely noted, have shared the fruits of human development – scholars highlight the high literacy rates, low maternal mortality, high life expectancy, low birth rates, high rates of contraception, and so on. Yet unemployment rates among women have been unacceptably high, work participation rates have shown but marginal improvement; gendered choices of occupation are found to be limiting women's earnings (CDS 2005: 107). The persistence of several gender unfreedoms in mobility, sexual choice in and out of marriage, full enjoyment of public spaces and facilities, and the free circulation of misogynist ideas in public discourse complete the gender paradox (CDS 2005; Devika and Kodoth 2001).

A certain "biological foundationalism" (Nicholson 1995) undergirded the 19th century missionary discussion on patrata, evident in the opening quote of this paper. The critique of caste in the late 19th century was often pegged on the projection of the male-female as the unquestionable biological foundation of human existence. Therefore, a major mandate of social reform in Kerala was the restoration of human beings to their true gendered selves, perceived as a cultural project serving to reinstate natural (and hence enduring) qualities and capacities. Traditional family and gender arrangements, it was argued, smothered these biologically grounded dispositions towards "femininity". The task of the missionary or the reformer was to remove the influence of tradition and hollow natural and biological dispositions into full-fledged capacities.

Therefore, women's access to education was harnessed to the project of shaping womanly capacities associated with modern domesticity and rational procreation. While educated women did win the right to public employment, the justifications were heavily gendered: the argument was either that women should take up womanly kinds of work, or that their interest in gainful employment should be strictly in the family's interest (Devika 2007). The latter argument became common sense. After all, educated women entered paid employment in a context marked by the Great Depression, changing agrarian relations and legislation abolishing the impartibility of joint family properties (Saradamoni 1999; Velayudhan 1999), the onset of the first phase of the demographic transition in Travancore and Cochin in the 1920s, rising dowry requirements in both matrilineal and patrilineal communities (Padmavaty Amma 1924), and rising consumption aspirations. Clear regulatory mechanisms that prevent their full-fledged integration into the public are still in place. The strong gender segregation of the public spaces in Kerala is one of these (Sikhera 2007). Particular forms of work were deemed unsuitable for the "respectable woman", for instance, nursing a feeling that reeked of casteist hubris. Educated women, however, did escape these strictures, for example, by migrating (Nair 2007). In general, concerns about respectability in women's work persist, even among the poorest and uneducated (Lindberg 2001; CDS 2005).

The improvements in life expectancy, maternal mortality, and the decline of fertility would be expected to have freed women from strictly domestic concerns and opened up their demand for new capacities. However, the provision of abilities by the state to women, hitherto, has more or less worked to reaffirm gender divides rather than question them. The success of contraception in Kerala is well known by now; less well known is the glaring lack of choices for women in contraceptive services. In this case, the state's provision of abilities through contraception is directed towards not so much as autonomous persons, as towards mothers/wives implicated in considerations of family upward mobility (Ramanathan et al 2005). This leads to a curious situation in which an unfreedom appears coupled with a freedom, for instance, alarmingly high numbers of female sterilisations and remarkably low fertility. Or what is freedom for the family does not work out to be freedom for the woman as an embodied person. Second, the failure to convert existing capacity into capability is evident in the case of senior women. Malayali women may live longer, but prevailing gender norms and poor provision of abilities for the aged offer very few life-options to senior women (Rajan and Sreerupa 2007).

Third, it leads to partial conversions which may, paradoxically, serve to exacerbate women's workloads and everyday struggles. A good illustration for this comes from the Kerala State Poverty Alleviation Mission, called the Kudumbashree Mission. The Kudumbashree, precisely because it has been able to add respectability to poor women's public presence, has drawn a considerable number of women out of their homes into self-help groups (Devika and Thampi 2007). However, despite its considerable reach, it has not been able to expand women's life-options in any fundamental sense. In fact, there is reason to think that public responsibilities now add up to a triple burden for poor women.

The question remains whether Malayali women's achievement of domestic capabilities, widely acknowledged to have been crucial to social development achievements (Jeffrey 2003), have secured for them desired functionings within and outside the family. From the above discussion, their achievements outside the family seem to be rather limited; besides there is evidence that Kerala ranks among the Indian states/union territories with higher rates of crime against women (CDS 2005: 117-19). Within the family, recent research about rising dowry rates in marriage across almost all social groups (Lindberg 2001; Kodoth 2006), studies on women's contraceptive-use patterns and birth control practices (Ramanathan et al 2005 ), and on cruelty at home and domestic violence (CDS 2005: 119) reveal a disconcerting picture. On the other hand, research on women who have successfully converted domestic capacities into capabilities and entered a favourable labour market, such as Malayali nurses, do indicate that these women not only contribute to family well-being but also improve their bargaining power in the family, even if within the limits of modern patriarchy ( Percot 2006).

## 4 Conclusions

This paper has tried to follow the history of human capability achievements in Kerala through the lens of a vernacular antecedent of the capability approach, revealing complex layers to the

process. The conjoining of capacities and ability, first suggested in missionary and allied discourses, soon became fundamental to the project of Travancorean nationalism in the late 19th century through its unique nationalist developmentalism and was soon taken forward by emergent communities in their negotiations with the modernising state. However, even as new avenues were opened through new capabilities, the resources, skills, and dispositions of many lower caste groups were eroded. The abilities offered to them by the state did not often match their valued dispositions, skills and knowledge. Most importantly, a host of developments post-1960s led to either the persistence or the widening of class and caste inequalities. Even the improved provision of basic capabilities by the state has not been effective in mitigating these.

Distinctly different is the gender paradox. Women are simultaneously inside and outside of social development, but this is resolved when we note that from the early 19th century, gender, conceived as both natural and cultural, has been regarded as a crucial determinant of human capacities. Women, therefore, have been directed towards womanly capacities, usually implicated in the domestic domain or low-pay and low-skill, heavy workloads outside. There is little evidence to show that the domestic capabilities acquired by women have been converted into desired functionings within family and marriage. The provision of abilities to women by the state has rarely questioned these givens; it has more often than not exacerbated gender divisions and inequalities.

The recent and ongoing neoliberalisation of welfare in Kerala has important implications crucial to understanding the present of the Kerala model. On the one hand, there appears to be shrinkage in the state's provision of abilities (Oommen 2008). On the other hand, the state has become progressively insensitive to the efforts made by marginalised groups to define valuable capacities and demand-specific abilities, evident in government responses to recent dalit and adivasi struggles. Equally serious is the ongoing instrumentalisation of the discourse of women's capabilities, in implementing responsibilised welfare in poor women's self-help group networks. The political implications of these developments are many. Pertinent here, perhaps, is the task of re-politicising the capability approach so that public action remains a continuously renewed project of democratisation.

## NOTES

1 This 1866 version was republished in 1993. Page numbers are from the newer version.

2 The capability approach regards economic growth as a bad indicator of the quality of life and instead stresses "capabilities". It emphasises the importance of expanding the range of what people are able to do and what they can aspire to be in society. A capability is neither an inborn ability, nor it is simply its outcome; instead, it requires key inputs over inborn abilities.

3 "Hollowing out" refers to a process that accompanied the shaping of a modern sense of the self in late 19th-early 20th century Kerala, and is set against the prevailing order of caste. It harks towards an idealised "order of gender", in which all bodies were to be equal, and whatever differences and inequalities persisted were to be products of the particular internal qualities, and qualities of the mind possessed by individuals. However, what was given before self-development as its "raw material" seemed importantly determined by the sexual endowment of the body, assumed to be unambiguously given at birth, as male or female. Self-development was to be a set of "hollowing" operations upon oneself, by which new internalities were to be dug out in the minds of individuals, and in which process, the capacities ostensibly given to men and women at birth – internal qualities given by virtue of their sex – were to be developed from the existing endowments of the body. This alone, it was argued, would transform them into ideal full-fledged (gendered) individuals (Devika 2007: 36-37).

4 The use of the term "developmentalism" in this essay must be distinguished from its more familiar usage by post-development theorists (Escobar 1995; Pieterse 1991). On the one hand, it carries the same descriptive meaning, of a certain faith in organised intervention in the collective affairs of the nation by the state according to a standard of improvement derived from a model historically shaped in north-west European countries. However, it is not treated as an unchanging monolith but as a discourse shaped as much by local contexts and conjunctures. Hence we trace its variants across time. Second, while I do agree with the problematisation of many features of purposeful modern state intervention by post-development theorists, it may be important not to romanticise anti-statism. A strict state versus people dichotomy is difficult to defend from the very specific historical experience of modern Kerala.

5 This 1905 version was reprinted in 1990. Page numbers, wherever mentioned, are from the newer version.

6 This 1900 version was reprinted in 1983. Page numbers, wherever mentioned, are from the newer version.

7 It has been noted that even in the earliest days of the mission, adherents increased whenever missionary influence promised to reduce caste disabilities (Yesudas 1980: 73-74). Missionaries reported difficulties in getting people to stick to the faith in times of economic distress when they went back to folk deities (Kooiman 1989). CMS efforts to remove "heathenish" practices from the Syrian church also fell flat (Agur 1905: 561-67).

8 As early as 1507, Kolathiri, the ruler of north Kerala, wrote to the King of Portugal that (John 1981: 347):

> [C]ertain people who I and my Nairs have as slaves and belong to the two castes, viz, the Tines (Tiyan) and the Mucoas (fishermen) should not be made Christians…For with the conversion of these slaves, conflict may arise between our vassals and these people. The Nairs derive their income from them and they do not want to lose it.

In Travancore, lower-caste converts persecuted by upper castes in the 18th century (John 1981: 444-45), submitted a memorandum to the king of Travancore in 1783, which subtly reminded him of his reliance on his subjects: "Do not oblige us to run away from your kingdom, but take pity on us" (John 1981: 445).

9 This 1906 version was reprinted in 1989. Page numbers, wherever mentioned, are from the newer version, in this case for Volume I specifically.

10 This is particularly evident when we consider the refashioning of the domestic among the Syrian Christian community in the early 20th century. The opposition to liberal provisions for women was no defence of a sanctified and inviolable "inner space", but in defence of the active creation of one that would be in step with the project of "industry and enterprise". Kodoth (2002) points out that the underpinnings of the reaffirmation of patriarchy through the iniquitous Travancore Christian Succession Act (1916) were institutional rather than structural or canonical.

11 "Report of Annual Distribution of Prizes" (1864) Madras Church Mission Records, 31(10): 345.

12 In contrast, economic opportunities generated through the late 19th century, the opening up of the economy and other shifts towards capitalism enabled certain groups to build capabilities out of existing dispositions and skills, for instance, the Ezhavas, who were already skilled in coconut farming, and the Syrian Christians, with strong traditions in trade and commerce (Tharakan 2002).

13 As Rammohan (1996: 269-70) remarks:

> While it would be tempting to infer a continuity of the equity ideas of the earlier Pulayar and Ezhavar social movements in the developing programme of the Communist Party, the latter was more directly derived from the Marxist idea of the incongruence between the developing productive forces and the outdated relations of production and the related Marxist notion of 'Progress'. The central question addressed was, therefore, economic equity, and it was seen as tantamount to social equity. Further, the emphases on state sector, planning, and heavy industrialisation reveal the "Soviet Model" as a major inspiration.

14 This 1937 version was republished in 1999. Page numbers, wherever mentioned, are from the newer version.

15 This 1935 version was republished in 1998. Page numbers, wherever mentioned, are from the newer version.

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