CHAPTER TWO

The Requirements of Discipleship

THE NECESSITY OF VIRTUE

The Mundaka Upanisad (1.2.13), which directs the student to seek out a teacher who is learned in the Vedas (devopi) and established in brahman (brahmanastham), also reminds the teacher, in the verse following immediately, of his obligations to the student.

To that student who approaches in the proper manner, whose mind is calm and who is endowed with self-control, the wise teacher should fully impart the knowledge of brahman, through which one knows the true and imperishable Person.1

My purpose in citing the above verse is to draw attention to the emphasis, in the Upanisads, on the appropriate mental and emotional state, along with a corpus of values, that makes learning about the nature of brahman possible. The text mentions one with a calm mind (pratihārtya) and self-control (jñānāntarata). The cultivation of basic moral values is an essential prerequisite for knowing brahman and this claim is reiterated throughout the Upanisads. The following are just a few of the direct statements in the Upanisads on the necessity for moral rectitude in the student:

One who has not abstained from evil conduct, whose senses are not controlled and whose mind is not concentrated and calm cannot gain the Self through knowledge.2

By truth this self can be grasped—
by austerity, by right knowledge,
and by a perpetually chaste life.
It lies within the body, brilliant and full of light,
which ascetics perceive,
when their faults are wiped out.3
Moral rectitude is important for inquiry into the scripture, with the guidance of a qualified teacher, because of the uniqueness of the knowledge of brahman. The knowledge of brahman, referred to as brahmajñāna, shares a common feature with other kinds of knowledge. Like other knowledge, it takes place in the mind. Unlike other kinds of knowledge, however, brahmajñāna is concerned with the nature of the subject, the 'I' who objectifies and knows everything. Where knowledge is concerned with realities other than the knower, it is not always necessary for the mind, the instrument of knowledge, to assume the nature of the object that it seeks to know. If a psychologist, for example, is studying the nature and causes of anger, she is not required to experience intense states of anger in her mind in order to understand the phenomena. The object of inquiry is not the "I."

In the case of brahman, one is seeking to know a reality that is identical with one's self and whose nature is quite different from that which one customarily thinks of as one's self. Brahman, for example, is peace and stillness and cannot be known in a mind that does not enjoy these dispositions. A mind that is restless and in turmoil will not easily discern the still self. It is as difficult as trying to see the reflection of the moon that is present in a muddy and agitated container of water. Brahman exists equally and identically as the self of all, and such a truth can be grasped and celebrated only in a mind that is loving and compassionate. A hate-filled mind will not be interested or take delight in a teaching about the sameness of self.

In the matter of knowing brahman, knowledge is synonymous with being or becoming. "The knower of brahman," as the Mundaka Upaniṣad (3.2.9) states it, "becomes brahman." One is identical with that which one seeks to know or to be, and so the instrument of knowledge, the mind, must conform to the nature of the object of knowledge. A seeker after brahman must restrain the extrovert tendency of the mind and turn it attention inward. The qualifications required for inquiry in Advaita make such an inward turning possible. As Sara Grant rightly observes, "One cannot 'do' theology as one may 'do' mathematics or history or any other branch of academic study. Unless our life-style and value-systems are in harmony with the demands of the Truth we are pursuing, we cannot hope for real enlightenment."

One who knows brahmān knows brahmān to be the self of all. The consequence of such an understanding, as the Bhagavadgītā (6.29) puts it, is to see "the self present in all beings and all beings present in the self." One grows to regard the sufferings and joys of others as one's own and becomes active in promoting and delighting in the well-being of others (sarvabhūtātma-ratā). Since relationships of compassion and love are expressive of the knowledge of brahman, the one who aspires to such knowledge must also cultivate these virtues. A virtuous life, in other words, is both the means to as well as the expression of brahmajñāna. In his commentary on the Kenā Upaniṣad, Śankara observes "that the knowledge of brahman arises in a man who has attained the requisite holiness through purification of the heart." "For," continues Śankara, "it is a matter of experience that, even though brahman is spoken of, there is either non-comprehension or mis-comprehension in the case of one who has not been purged of his sin..."

There is another reason for emphasizing the qualifications of the disciple. The knowledge of brahman, once gained, becomes meaningful only when retained in the mind. This is not true for other kinds of knowledge that do not concern the nature of one's self. To forget brahman is to forget the true nature of oneself. Such an unbroken recollection of the nature of oneself requires mindfulness and self-control. Whenever and for whatever reason the mind becomes forgetful of the self, it should be gently led back to it. "By convincing oneself of the illusoriness of sense-objects through an investigation into their real nature," writes Śankara, "and by cultivating indifference to worldly objects, the mind can be restrained from sense-objects and brought back to the self wherein to abide firmly." The Advaita tradition has systematized and summarized the requirements of discipleship into four interrelated qualities or values. These are collectively referred to as the fourfold means (sādhanacaturtya) and include: viveka, vairāgya, śamādhiśaṅkāpamānā, and mumukṣutsवam. In his commentary on the Brahma-sūtra, Śankara refers to these requirements as, "discrimination between the eternal and the non-eternal; dispassion for the enjoyment of the fruits (of work) here and hereafter; a perfection of such practices as control of the mind, control of the sense organs, etc.; and a hankering for liberation." We will consider each one in turn and comment on the interrelatedness of all four.

VIVEKA

Viveka is the capacity to distinguish between the timeless (anītya) and the timebound (anītya). Advaita commentators generally elaborate by explaining that viveka is recognition that brahman alone is eternal and everything else is non-eternal. The problem here is that a student, at the commencement of her study with a teacher, already understands and knows the eternal brahman, there is no need for further inquiry. Viveka, as the ability to distinguish the eternal from the non-eternal, is what one would expect from the student after the gain of knowledge.

At this initial stage, the student is endowed with viveka since she has assessed the various experiences of her life and has come to the conclusion that finite gains and accomplishments have an ultimately unsatisfactory character. She knows that lasting fulfillment cannot be found in the finite. In other words, while she may not yet know the eternal, she has reflected deeply on the non-eternal and its limits. Viveka also suggests a capacity for rational inquiry and sustained reflection into the claims of the scriptures. The knowledge of brahman results from an inquiry (ijjñāsi) into the nature of brahman as revealed in the scripture and interpreted by the teacher. Being a non-object, and being free from the
characteristics that are normally used to define and describe entities in the world, both teacher and scripture use language in unusual ways to enable the student to grasp its reality. The Upanisads themselves speak of the necessity for a sharp and pointed mind. An inquisitive, energetic, and alert mind is an asset to a student of brahmajñāna.

### VAIRĀGYA

Vairāgya is freedom from longing for objects of enjoyment in this or other worlds. This outlook is a direct consequence of the conviction that non-eternal gains are ultimately unsatisfactory. Vairāgya, which is a healthy detachment from unrealistic expectations about finite gains and pleasures, arises from the exercise of viveka. Vairāgya is not a running away from the world because of fear or disgust. Vairāgya is a conviction born out of the understanding that while there are many legitimate worldly achievements and forms of enjoyment, there is a human need for meaning and fullness that these leave unsatisfied. A vairāgin (one who possesses vairāgya) does not hate or condemn the world but enjoys life without greed and with detachment. T. M. P Mahadevan’s characterization of vairāgya as “the disgust for seeing, hearing etc. of ... non-eternal things,” is a rather negative and antiworldly way of defining this value.

Vairāgya is commonly associated with asceticism, mortification of the body, and the rejection of ordinary life in the world. Such practices and attitudes, however, often betray a lack of understanding about the fundamental human problem and its solution. A well-known portrait in the Bhagavadgītā illustrates this misunderstanding:

In front there is fire; at the back, there is the sun; in the night, (the ascetic) sits with the knees stuck to the chin; he receives alms in his palms, and lives under the trees; yet the bondage of desire does not leave him.

The ascetic, described in this verse, warms himself with the heat of an inadequate fire at night and tries to stay comfortable by drawing his knees as close as possible to his chin. During the day, he relies on the heat of the sun. He owns no utensils for cooking or eating and is homeless. His renunciation, however, is merely outward, since his mind is still caught in the noose of brooding. Vairāgya is not a running away from the world because of fear or disgust. Vairāgya is a conviction born out of the understanding that while there are many legitimate worldly achievements and forms of enjoyment, there is a human need for meaning and fullness that these leave unsatisfied. A vairāgin (one who possesses vairāgya) does not hate or condemn the world but enjoys life without greed and with detachment.

### SAMĀDISATKASAMPATTI

The third requirement of discipleship is actually a group of six qualities referred to as the wealth of six discipuléś (samādisatkasampatti). These are sāma, dama, upapama, titikṣa, trādha, and samādhiḥāna. Sāma is the control or restraint of one’s mind. A mind that has cultivated the qualities of viveka and vairāgya enjoys greater control. In the Bhagavadgītā 6:33–34, Arjuna raises, with his teacher, Kṛṣṇa, the problem of the mind’s instability. He describes the mind as being turbulent, powerful, obstinate, and as difficult to restrain as the wind. While conceding that the mind is unsteady and difficult to restrain, Kṛṣṇa (6:35) recommends the regular practice of vairāgya. The restless character of the mind is, in part, a consequence of the human search for happiness. The mind moves from object to object, from gain to gain, in search of an elusive fulfillment. When one understands this predicament, one is in a better position achieve mastery over one’s mind. The mind, as a result of established tendencies and habits, may be drawn to objects even when one has understood the temporal nature of these. A person who has cultivated the quality of sāma is able to control the direction in which thought flows by the practice of reflecting on the limits of the finite. This technique is referred to as pratipakṣa bhavana or reflecting on the opposite. It is often necessary to repeat this until detachment toward the particular object is attained. The mental energies of a disciple lacking in sāma are easily dissipated and she may find it very difficult to investigate the scriptures with the teacher, and to reason and reflect on their meaning.

Dama is the control of one’s sense organs and organs of action and is an outcome of sāma. The relationship between inward (sāma) and outward...
control (dama) is beautifully considered in one of the famous analogies of the Katha Upanishad (3:3-6). In this analogy, the body is likened to a chariot, reason to the charioteer, the mind to the reins, the senses to the horses, and the sense-objects to the roads. One who lacks understanding (viśeva) and whose mind is consequently unrestrained loses control of his sense organs like the vicious horses of an unskilled charioteer. Where reason is enriched with wisdom, the mind is controlled and the senses are properly directed. One who achieves such control attains the goal of human existence (mokṣa). While dama should ideally follow from āsama, there may be instances where one finds it difficult to check one's internal responses. Dama, however, ensures that these responses are kept at the mental level and do not find unpleasant and harmful expression in words and actions.

Upāraṇa or usparāṇi is the faithful observance of one's own duties.²⁰ In traditional Hindu society, one's duty (dharma) was defined primarily with reference to one's stage (āśrama) of life and one's place in the caste (varna) system. The social system resulting from the integration of these two orders is known as varṇāśrama-dharma. The four stages are those of the student (brāhmaṇa), householder (gṛhastha), forest-dweller (vanaprastha), and renunciation (sannyāsa). The four varnas consist of priests and teachers (brāhmaṇa), rulers and warriors (kṣatriya), merchants and farmers (vaiśya), and laborers and servants (śudra). Each stage and caste had its defined duties.²¹ The social order was essentially conservative in character since membership in a varna was usually determined by birth and faithful adherence to duty emphasized as a requirement of religious growth. The system also led to the creation of a large group of outcasts who were considered ritually impure and denied the opportunities and privileges enjoyed by members of the four varnas.

In contemporary Hindu society, however, the social order is in transition and duty is not always defined with reference to stage in life and caste. Occupational choices are less limited by birth. The rich concept of duty, however, which incorporates dedicated performance of one's work and the notion of work as obligatory offering, is not inextricably bound to the system of varṇāśrama-dharma. It can enrich and enhance the meaning of work that is freely chosen. The significance of upāraṇa as a requirement of discipleship is that work in the world is not necessarily incompatible with the quest for liberation, and must be carried out with a sense of sanctity and obligation.²²

Tīrthaka is defined as the ability to endure life's opposites. It is an acknowledgment of the shifting dualistic nature of reality. Experiences of pain and pleasure, gain and loss, comfort and discomfort are a part of the fabric of life and one has to discover the ability to maintain an equilibrium in the midst of them all. Tīrthaka is not an unemotional inability to discern the difference between a pleasant outcome or experience and an unpleasant one. One should be able to delight in a desired outcome with a poise and wisdom that an undesirable outcome does not shatter. One knows the limits of all finite experiences, pleasant and unpleasant, and refuses to be distracted by any one of them in the quest for brahmān. "Physical sensations," says Kṛṣṇa in Bhagavadgītā (2:14), "causing cold, heat, pleasure or pain, come and go and are impermanent... Endure (sūkṣma-rhavam) them."²³

Sraddhā is faith in meaning of the scripture as taught by the teacher.²⁴ A student goes to a teacher after scrutinizing the finite gains that are possible through human action and with a conviction about the inability of any of these to satisfy the deepest human wants and longings. She approaches the teacher after hearing that there is a wisdom that resolves the fundamental human problem. Sraddhā is freedom from cynicism about life and is a commitment to inquiry with the teacher's guidance. A deep-rooted skepticism about the teacher or the scripture makes it impossible to patiently undertake any inquiry. Sraddhā, however, should not be construed as implying an unthinking obedience and acceptance of everything required and taught by one's teacher.²⁵ While truth about the ultimate may not be entirely accessible through the independent operations of human reason, the search for it does not require the suspension or abandonment of human rationality. The Upaniṣads commend the role of the human intellect in the process of inquiring into brahmān.²⁶

Samādhiṇā is the ability to focus the mind on a particular enterprise or field of activity without being easily distracted. For the Advaita student, this means dedication to the task of listening, reasoning, and contemplating on the meaning of the scripture. Distractions ought to be minimal for someone who is endowed with citraṇa and satrāṇa and who has developed self-control. Since the world of finitude does not offer the fullness that she seeks, she is ready to consider and energetically pursue the Vedantic alternative. Samādhiṇā is generally equated with cītta ekagraṇa or single-pointedness of mind.

MUMUKṢUTVA

The fourth and final qualification for discipleship is mumukṣutva. This is an intense desire for liberation (mokṣa), arising, as we have seen, from a personal discovery of the fact that the fulfillment of desires for the finite does not resolve one's experience of want and dissatisfaction. One who is motivated by a desire for liberation is called a mumukṣu. The student, like Narada, experiences the reality of sorrow and yearns for a way of overcoming it. Her interest in the scripture and teacher is not the expression of a detached curiosity. She goes to the teacher with an ardent hope that he teaches a wisdom and way across suffering. Sādānanda describes the student as approaching the teacher in the same manner that one whose head is on fire rushes to a lake.²⁶ In the absence of mumukṣutva, exposure to the scripture and teacher will have minimal personal significance. The wisdom of the scriptures comes with the impact and revelation of a solution only when the predicament of a life is brought before it with faith.

One who exemplifies the above fourfold means is eligible for inquiry into the Vedānta. She becomes an adhikārin, that is, a qualified student for the knowledge of brahmān. It should be emphasized here that Advaita does not
require the perfection of the fourfold means as a precondition for inquiry into brahman. As one understands and becomes centered in brahman, one's understanding of these values and their expression in one's life also grow and deepen. They manifest in one's thinking and behavior in a more spontaneous manner. A seeker must be aware of these values and their importance and strive diligently to express them in her thinking and conduct.

**SADHANA CATUSTAYA AND THE IMMEDIACY OF KNOWLEDGE**

The knowledge of brahman, in the Advaita tradition, is not objective information about brahman. It is knowledge about the fundamental nature of the seeker. The fruit of knowledge is discovering one's identity with brahman, overcoming sorrow and attaining immortality. Mundaka Upaniṣad (3.2.9), as it concludes, summarizes the consequences of brahmajñāna.

When a man comes to know that highest brahman, he himself becomes that very brahman. A man without the knowledge of brahman will not be born in his family. He passes beyond sorrow, he passes beyond evil. Freed from the knots of the heart, he will become immortal.28

The Kaṭha Upaniṣad (6:18) also concludes with a praise and summary of the results of brahmajñāna.

Then after Nāciketas received this body of knowledge, and the entire set of yogic rules taught by Death, he attained brahman; he became free from aging and death; so will others who know this teaching who are grounded in brahmajñāna.

The emphasis in the Upaniṣads is on the immediate attainment of brahman, immortality, and freedom from sorrow as a consequence of knowledge. These immediate results are possible for the disciple, such as Nāciketas, who comes to the teacher and scripture endowed with the fourfold qualifications. Such a disciple can proclaim with delight, like the students at the end of the Pūrva Upaniṣad (6.8) to their teacher, Pippalāda, "You are, indeed, our father, for you have taken us to the farthest shore beyond ignorance." For a disciple with the fourfold qualifications, and particularly with faith ( śraddhā), the scripture functions, as it is meant to do in the Advaita understanding, as an immediate and valid source of knowledge about brahman. A contemporary Advaita Vedānta teacher compares scripture to the eyes and emphasizes that even "as eyes are not an aid to seeing but are the means by which one sees, so, too, the words of the Vedānta are not an aid to knowing oneself but are the very means by which one knows oneself. Vedānta is not an aid which makes it easier to understand the nature of oneself thorough some other means. Vedānta is the means. The words of the Vedānta are the instrument for knowing oneself just as the eye is the instrument for seeing."30

The traditional emphasis on the requirements of discipleship is explicable in a context where the human problem was recognized and treated seriously as an existential problem and where the scripture enjoyed the status of a valid means of knowledge capable, in the hands of a learned and liberated teacher, of freeing from sorrow. It is common, therefore, for the Upaniṣads to conclude by identifying the eligible disciple. The Śvetāvatara Upaniṣad (6:22–23), for example, concludes with the following verses:

This highest Vedānta secret, expounded in a former age, should not be given to one who is not tranquil, or to an unworthy son or an unworthy disciple. These truths shine only when expounded to the great soul who has supreme devotion to God and for the teacher.31

Mundaka Upaniṣad (3.2.10) concludes with the following instructions about teaching:

Who are versed in the Vedas and perform rites,
Who are grounded in brahman,
Who offer for themselves, with faith in the lone seer, to these alone, let a man teach this knowledge of brahman.
So long as they have duly performed the head-vow.32

**ELIGIBILITY FOR DISCIPLESHIP AND THE CASTE SYSTEM**

A major problem, however, with the orthodox understanding of eligibility or competence ( adhitikāra) to inquire into the Upaniṣads is that it has been interpreted with reference to varnasāmadarśa. Within the confines of this worldview, eligibility for Vedic study was limited to male members of the first three castes. Women and śūdras were excluded, as well as the untouchables who were without caste. The fourfold qualifications, in other words, were not overlooked, but interpreted within the hierarchy and privileges of the caste system. Excluding large groups on the basis of birth criterion and not strictly on the basis of the fourfold requirement thus circumscribed the universality of the latter. In the Upaniṣadabārī (II.1), for instance, Śaṅkara, emphasizes the fourfold requirements along with the stipulation that the student must be of the brāhmaṇ caste.

The means to final release is knowledge (brahman). It should be repeatedly related to the pupil until it is firmly grasped, if he is dispassionate toward all things non-eternal which are attained by means [other than knowledge]; if he has abandoned the desire for sons, wealth, and the worlds and reached the state of a paramahamsa, wandering ascetic; if he is endowed with tranquility, self-control, compassion, and so forth; if he is possessed of the qualities of a pupil which are well known from the scriptures; if he is a Brahmin who is
Sāṅkara clearly upholds the traditional social order of evarnaṁśtvamyaṁsvastha and rejects the rights of śudrā to study the Vedas. "The śudra," according to Sāṅkara, "has no competence, since he cannot study the Vedas; for one becomes competent for things spoken of in the Vedas, after he has studied the Vedas and known these things from them. But there can be no reading of the Vedas by a śudra; for Vedic study presupposes the investiture with the sacred thread, which ceremony is confined to the three castes." Śāṅkara quotes, with approval, passages from a variety of Hindu authoritative writings supporting the exclusion of the śudras from hearing, study, and knowing the meaning of the Vedas.

As for prohibition of hearing, we have the text, "Then should he happen to hear the Vedas, the expiation consists in his ears being filled with lead and lac," and "He who is a śudra is a walking crematorium. Hence one should not read in the neighbourhood of a śudra. From this follows the prohibition about study. How can one study the Vedas when they are not to be recited within his hearing? Then there is the chopping off of his tongue if he should utter the Vedas and the cutting of the body to pieces if he should commit it to memory."

Śāṅkara does allow śudras the opportunity for liberating knowledge but this may be acquired indirectly by hearing through texts that are secondary in authority and status to the Vedas, such as the Itiḥāsas and Purāṇas. While such a concession may be commendable, one must still wonder about the reality of śudras having access to liberating knowledge through secondary texts. Do we have any examples? Control of these texts would still remain in the hands of brahmans, and śudras would continue to be subservient and dependent. While it is true, as Michael Comans argues, that Śāṅkara's position reflects the conditions of his time, criticism of inequality does not only reflect "the vantage point of our times when the principle of political equality, stemming from the European Enlightenment, is now widely accepted as a moral right."

Criticism of caste inequality, as far as the knowledge of brahmān is concerned, can also find justification in the Advaita teaching about the identity and sameness of self in all beings. It remains a matter of concern that the greatest historical exponent of this teaching remained untroubled by social inequality, a contradiction that is still not uncommon. There is still a tendency to offer mild explanations for Śāṅkara's attitude.

In the light of the universality of the human problem which Advaita addresses and in view of its claim that the Upaniṣads are a valid source of knowledge for addressing and resolving this problem, it is necessary for the tradition to emphasize an eligibility that is centered on the fourfold requirements and to sever the connection between these requirements and the traditional caste system. It is helpful to note the fact that the fourfold means do not contain any stipulations about caste and that Śāṅkara does not deny the ability of members of the so-called lower castes to gain liberating knowledge. He denies them the right to Vedic study but not to brāhmaṇa.

The fourfold requirement must also be liberated from the prejudices and power hierarchies of patriarchy. These requirements share a great deal with the demands of the religious path in many traditions and their disconnection from the caste order and patriarchy would enhance the rationality and human claims of the Vedānta. Human beings everywhere experience the existential meaninglessness of a Nārada or the discontent with wealth of a Maitreyi and this, more than anything else, entitles them to the opportunity for Advaita inquiry. The liberation of Advaita from the constraints of a conservative social and ritual order will not only enhance its universality, but will also unleash its potential to challenge the social and religious inequalities of caste and gender. There is a need, today, for the monastic orders and institutions associated with the tradition of Advaita to explicitly and formally renounce eligibility that is based on caste and gender and articulate an interpretation of Vedantic eligibility that is centered solely on the fourfold means discussed above. There are rich resources within the tradition for doing so, but it requires also a willingness to self-critically admit historical and contemporary injustices of caste and gender and to subject Śāṅkara's endorsement to rigorous historical criticism.