

INDIA'S RESERVATION POLICY IN THE SOCIO-ECONOMIC AND POLITICAL CONTEXT

Soma Chakraborty

Research Scholar, Dept of Political Science, Mansarovar Global University, Bhopal, MP.

ABSTRACT

The Reservation Policy of India stands as one of the most prominent socio-political reforms aimed at achieving social justice and equitable opportunities for historically marginalized communities. Anchored in the constitutional ideals of equality, liberty, and fraternity, it seeks to dismantle deep-rooted structural inequalities, particularly those arising from the caste system. Initially intended for Scheduled Castes (SCs) and Scheduled Tribes (STs), who were systematically excluded from education, property rights, and dignified employment, the policy has since expanded to include Other Backward Classes (OBCs) and, more recently, the Economically Weaker Sections (EWS) of the general category.

This paper examines the reservation policy through a socio-economic lens, tracing its historical evolution, assessing its impact, and identifying areas for reform. It argues that the objective of reservation—aligning with the Preamble's vision of justice and equality—is essential for integrating disadvantaged communities into the mainstream, thereby strengthening national unity.

Keyword: *Reservation Policy, Economic-based Reservation, Caste-based Reservation, Economically Weaker Sections, Social Justice, Socio-economic Disparities, Education system.*

1. INTRODUCTION

Reservation in India is all about reserving access to seats in government jobs, educational institutions, and even legislatures to certain sections of the population. Also known as affirmative action, the reservation can also be seen as positive discrimination. The policy aims to provide equal opportunities in education, employment, and political representation to groups that have historically been excluded from mainstream social and economic development. The Reservation Policy of India is one of the most significant instruments of social engineering designed to address the historical injustices and entrenched inequalities faced by marginalized sections of society. Rooted in the ideals enshrined in the Preamble to the Constitution of India—Justice, Liberty, Equality, and Fraternity—this policy seeks to correct the socio-economic imbalances created over centuries by a rigid and hierarchical social structure, most notably the caste system.

2. HISTORICAL BACKGROUNDS:

The origins of reservation policy can be traced to efforts undertaken during the colonial period to address social inequalities and improve

representation of marginalized communities. The traditional caste hierarchy restricted access to education, employment, and public life for large sections of society. These inequalities generated demands for corrective measures aimed at promoting social inclusion and equal opportunities.

The system of reservation existed in India even before independence in several areas of British India. William Hunter and Jyotirao Phule in 1882 originally conceived the idea of caste-based reservation system and the British Raj introduced elements of reservation in the Government of India Act of 1909. When India got independence, the constituent assembly formed the constitution of India, social discrimination based on the caste system was big hindrance to equality in society. Several princely states-initiated reservation policies before independence. The Kingdom of Mysore introduced reservations in government employment for backward communities in 1921. Similar measures were adopted in the Madras Presidency and the princely state of Kolhapur. These initiatives represented early attempts to improve representation and reduce social disparities.

A notable commission in this reservation context is the Mondal Commission. This commission was formed in December, 1978 under the chairmanship of B.P Mondal. In 1980, the Mondal Commission concluded that India's population consisted approximately 52% OBC, therefore 27% government jobs should be reserved for them. The commission was developed 11 indications of social, educational and economic backward and apart from the classes of Hindus, the commission has also identified backward classes among non-Hindus (Muslim, Sikhs, Christians and Buddhist).

Few Articles of Indian Constitution:

****Article 15(4) *:** State can make special provisions for socially and educationally backward classes.

****Article 16(4) *:** Reservation in public employment for backward classes of citizens who are not adequately represented in public services.

****Article 46*:** Directive to promote the educational and economic interests of weaker sections, especially SCs and STs.

**** Article 243D:** Provides reservation of seats for SCs and STs in every Panchayats.

**** Article 243T:** Provides reservation of seats for SCs and STs in every Municipality.

The constitution of India States in article 15 (4) "Nothing in (article 15) on in clause (2) of article 29 shall prevent the State from making any special provision for the advancement of any Socially, and educationally backward classes of citizens of or for the scheduled Castes and the Schedules Tribes". In the article 16 (4) and (6), the Government jobs like IAS, IPS and in article 334, Legislature (Parliament and State legislature has been reserved by the Constitution of India.

Article 46 of the constitution states that "The State shall Promote with Special care the educational and economic interests of the weaker sections of the people, and Particular, of the Scheduled castes and the scheduled Tribes, and Shall Protect them from Social injustice and forms of exploitation".

Supreme Court in the same case also upheld the principle that the combined reservation beneficiaries should not exceed 50 percent of India's population.

The concept of 'creamy layer' also gained currency through this judgment and provision that reservation for backward classes should be confined to initial appointments only and not extend to promotions.

Before 2019, the reservation was provided mainly on the basis of social and educational backwardness (caste). However, after the 103rd constitutional amendment in 2019, economic backwardness is also considered.

Apart from the reservation quota, additional relaxations like upper-age relaxations, additional attempts, and lower cut-off marks are also provided for various reservation categories.

3. OBJECTIVE OF RESERVATION:

The concept of reservation was introduced to combat a long existing practice of discrimination and stereotyping within the rural Hindu Communities, which were divided into caste. In terms of its importance, the need for reservation can be looped at from one of two perspectives, those being a legal perspective and socio-cultural perspective.

The discrimination faced by these marginalized groups was indicative of the constant oppression faced by them, dealt out by those considered to be of a 'higher' class than them.

The makers of the Constitution felt that these classes needed to be a part of the law-making procedure, and special provisions had to be granted to them to incorporate them into the process.

To delve further into the social and cultural background of casteism and reservation, we have to clearly establish the varna system in the Hindu religion, consisting of the Brahmins, the Kshatriyas, and Vaishyas originally. A fourth sect by the name of Shudras also developed who existed as cleaners, meant to serve the three 'higher' sects.

Apart from these four sects, people who were not classified under the varna system were regarded as 'Dalits' or untouchables. Their existence and touch were believed to pollute everything near them. They were relegated to perform tasks which were considered 'impure' such as cremation, etc. Over time, this practice has also bled into other religions like Christianity and Islam, who

discriminate against those who are considered to be of a 'lowly birth

3.1. SC/ST Reservation:

The objective of providing reservations to the Scheduled Caste (SCs), and Scheduled Tribes (STs) in services is not only to give jobs to some persons belonging to these communities. It basically aims at empowering them and ensuring their participation in the decision-making process of the State.

Scheduled Castes (SC) are given a 15% quota in jobs/higher educational institutions while Schedule Tribes (ST) are given a 7.5% quota in jobs/higher educational institutions.

3.2. OBC Reservation:

Reservation for Other Backwards Classes (OBC) was introduced based on the Mandal Commission Report (1991). The quota for OBCs is 27% in government jobs and higher educational institutions.

However, there is a concept of a 'creamy layer' with respect to the OBC reservation. Only those from OBC who come under the Non-Creamy Layer would get an OBC reservation.

3.3. EWS Reservation:

The Central Government of India recently introduced EWS Reservation. A 10% quota is provided for the Economically Weaker Sections (EWS) among General Category candidates in government jobs and educational institutions. This is done by adding clauses for the same in the Indian Constitution (103rd Constitution Amendment Act, 2019).

Table 1.1: Major Findings of Studies on Caste-Based Reservation

Author(s) / Study	Year	Focus Area	Major Findings
B.R. Ambedkar	1945	Social Justice and Representation	Reservation was essential for ensuring political representation and social upliftment of historically oppressed communities.
Kaka Kalelkar Commission	1955	Backward Classes Identification	Recommended special measures for socially and educationally backward classes to reduce inequalities.
Mandal Commission	1980	OBC Reservation	Identified social and educational backwardness as major criteria and recommended 27% reservation for OBCs.
Galanter	1984	Compensatory Discrimination	Reservation contributed significantly to increasing representation of marginalized groups in public institutions.
Deshpande	2006	Educational Access	Reservation improved access to higher education for SCs and STs but disparities continued in quality and outcomes.
Thorat and Newman	2007	Social Exclusion and Discrimination	Persistent caste-based discrimination justified the continued need for affirmative action policies.
Weisskopf	2004	Higher Education Performance	Students admitted through reservation performed satisfactorily when provided adequate institutional support.
Jodhka and Kumar	2010	Social Mobility	Reservation enhanced social mobility and increased participation of marginalized groups in professional occupations.
National Commission for Scheduled Castes	2015	Socio-Economic Development	Reservation contributed to improvements in literacy, employment, and political representation among SCs.
NITI Aayog Reports	2020	Inclusive Development	Reservation remained an important instrument for reducing socio-economic inequalities and promoting inclusion.

Recent Empirical Studies	2021–2024	Contemporary Impact Assessment	Reservation has improved representation and opportunities, but concerns remain regarding creamy layer benefits, implementation efficiency, and equitable distribution.
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Source: Compiled from Books, Commission Reports, Research Journals, Government Publications, and Studies on Reservation Policy in India.

Table 1.1 summarizes major findings from important studies and reports on caste-based reservation in India. The literature consistently indicates that reservation has played a significant role in enhancing educational access, employment opportunities, political representation, and social mobility among historically disadvantaged communities. Foundational studies and commission reports emphasized the necessity of affirmative action in addressing centuries of social exclusion and discrimination. More recent studies have acknowledged the positive impact of reservation while also highlighting challenges such as uneven distribution of benefits, creamy layer concerns, and implementation issues. Overall, the literature supports the view that caste-based reservation remains a crucial mechanism for promoting social justice, equality, and inclusive development in India.

4. STUDIES ON POLITICAL RESERVATION:

Political reservation has attracted considerable scholarly attention due to its implications for democratic participation and representation. Researchers have examined the effects of reserved seats in Parliament, State Legislative Assemblies, Panchayati Raj Institutions, and Urban Local Bodies.

Numerous studies indicate that political reservation has increased the representation of

marginalized communities in governance structures. The reservation of seats for Scheduled Castes and Scheduled Tribes has enabled historically excluded groups to participate in legislative processes and influence policy decisions affecting their communities[30].

Research on local self-government institutions demonstrates that political reservation has strengthened grassroots democracy. Reserved seats in Panchayats and Municipalities have facilitated the participation of marginalized communities in local governance and development planning. Studies report improvements in resource allocation, community participation, and responsiveness to local needs in areas represented by reserved-category leaders.

Scholars have also investigated the relationship between political reservation and empowerment. Their findings suggest that representation alone may not automatically lead to substantive empowerment. Factors such as institutional capacity, political experience, socio-economic conditions, and administrative support influence the effectiveness of political participation.

Several studies emphasize that political reservation has enhanced the visibility of disadvantaged communities in public discourse and contributed to the democratization of political institutions. Nevertheless, challenges related to proxy representation, limited decision-making authority, and socio-political constraints continue to be discussed in the literature.

Table 1.2: Impact of Political Reservation on Democratic Participation

Area of Impact	Description	Major Outcomes
Political Representation	Reservation ensures the representation of SCs, STs, and other marginalized groups in elected bodies.	Increased presence of disadvantaged communities in Parliament, State Assemblies, Panchayats, and Municipalities.
Electoral Participation	Encourages marginalized groups to participate actively in elections as voters and candidates.	Higher voter turnout and greater political engagement among reserved communities.

Leadership Development	Creates opportunities for emerging leaders from historically excluded groups.	Development of grassroots leadership and community-based political representation.
Policy Advocacy	Enables representatives from marginalized communities to raise issues affecting their groups.	Improved focus on welfare, education, healthcare, and social justice policies.
Democratic Inclusion	Broadens participation in governance and decision-making processes.	Strengthening of inclusive and participatory democracy.
Social Empowerment	Political participation enhances confidence, awareness, and social status.	Increased self-reliance and community empowerment.
Women's Participation	Reservation for women in local bodies promotes gender-inclusive governance.	Greater involvement of women in political and administrative decision-making.
Local Governance Effectiveness	Reservation in Panchayati Raj Institutions improves grassroots governance.	Better attention to local development needs and community welfare.
Accountability and Transparency	Representation of diverse groups enhances responsiveness of public institutions.	Improved governance and citizen participation.
Reduction of Political Exclusion	Addresses historical underrepresentation of marginalized communities.	Greater equity in democratic institutions and governance structures.
Community Mobilization	Encourages collective action and awareness among disadvantaged groups.	Increased civic engagement and social participation.
Inclusive Policy Formulation	Diverse representation contributes to balanced policymaking.	More equitable and socially responsive development policies.

Source: Compiled from Constitutional Provisions, Election Commission Reports, Panchayati Raj Studies, Government Publications, and Research on Political Reservation in India.

Table 1.2 highlights the impact of political reservation on democratic participation in India. Political reservation has significantly improved the representation of Scheduled Castes, Scheduled Tribes, and other marginalized communities in legislative and local governance institutions. It has strengthened democratic inclusion by encouraging electoral participation, leadership development, and community mobilization. The reservation of seats for women in local self-government institutions has further enhanced gender-inclusive governance and political empowerment. Studies indicate that political reservation has contributed to more responsive policymaking, improved accountability, and greater attention to the welfare needs of disadvantaged communities. Overall, political reservation has emerged as an important mechanism for deepening democracy, promoting

social justice, and ensuring equitable participation in governance.

5. SOCIAL INCLUSION THEORY:

Social Inclusion Theory emphasizes the integration of all individuals into social, economic, political, and cultural processes. It seeks to eliminate barriers that prevent certain groups from participating fully in society. Social inclusion involves access to opportunities, resources, rights, and decision-making processes.

Historically marginalized communities often experience multiple forms of exclusion, including educational deprivation, economic disadvantage, social discrimination, and political underrepresentation. Reservation seeks to address these forms of exclusion by guaranteeing representation and access to opportunities.

The theory argues that inclusive societies are more stable, equitable, and productive. When disadvantaged groups participate fully in development processes, social cohesion increases and inequalities decline. Reservation therefore functions as an instrument of inclusion by

facilitating participation in institutions that were previously inaccessible to marginalized communities.

Table 1.3: Dimensions of Social Inclusion Promoted through Reservation

Dimension of Social Inclusion	Description	Role of Reservation
Educational Inclusion	Ensuring access to schools, colleges, universities, and professional institutions for disadvantaged groups.	Reservation provides reserved seats and scholarships, increasing educational participation and literacy levels.
Employment Inclusion	Enhancing representation in government services and public sector employment.	Reservation creates opportunities for marginalized communities to secure stable employment and economic security.
Political Inclusion	Facilitating participation in democratic institutions and governance processes.	Reserved seats in Parliament, State Legislatures, Panchayats, and Municipalities ensure political representation.
Economic Inclusion	Improving access to income-generating opportunities, resources, and economic mobility.	Reservation contributes to better employment prospects and socio-economic advancement.
Social Inclusion	Reducing discrimination, exclusion, and social barriers faced by disadvantaged groups.	Reservation promotes acceptance, dignity, and integration into mainstream society.
Cultural Inclusion	Protecting and recognizing the identities, traditions, and rights of diverse communities.	Reservation supports representation of tribal and marginalized cultural groups in public institutions.
Institutional Inclusion	Ensuring equal participation in educational, administrative, and governance structures.	Reservation improves diversity and inclusiveness within public institutions.
Leadership Inclusion	Encouraging leadership development among historically underrepresented groups.	Political and employment reservations help create future leaders from marginalized communities.
Democratic Inclusion	Strengthening democratic participation and equitable decision-making.	Reservation broadens representation and promotes inclusive governance.
Regional Inclusion	Addressing developmental disparities among geographically disadvantaged populations.	Special provisions for tribal and backward regions improve access to opportunities.
Entrepreneurial Inclusion	Promoting entrepreneurship and self-employment among disadvantaged sections, especially women.	Reservation-linked schemes and support programs encourage business development and economic independence.

Source: Compiled from Constitutional Provisions, Social Justice Theories, Government Reports, and Studies on Reservation and Inclusive Development.

Table 1.3 highlights the various dimensions of social inclusion promoted through reservation policy in India. Reservation extends beyond educational and employment opportunities to

encompass political, economic, social, cultural and institutional inclusion. By providing access to resources and representation for historically disadvantaged groups, reservation contributes to reducing inequalities and enhancing participation in mainstream society. The policy also supports leadership development, democratic empowerment, and entrepreneurial growth, particularly among women and marginalized communities. Thus, reservation functions as a

multidimensional instrument of social inclusion and plays a crucial role in achieving the constitutional goals of equality, justice, and inclusive development.

6. SOCIO-ECONOMIC DIMENSIONS OF RESERVATION:

The socioeconomic dimensions of reservation in India are about providing historically disadvantaged groups (Scheduled Castes, Scheduled Tribes, Other Backward Classes, and recently Economically Weaker Sections) with affirmative action to achieve social justice, upward mobility, and better representation in education and government.

7. POVERTY AND ECONOMIC BACKWARDNESS:

Though caste-based reservation has provided some benefits to some large population groups, there is also an argument against it. Poverty and unavailability of resources are not limited to any particular caste or group but cut across caste lines. This reality has led to calls to base reservation policies on an economic criterion, with supporters arguing poverty is a more universal marker of disadvantage in comparison to caste.

A pivotal shift occurred when the Economically Weaker Sections (EWS) reservation was introduced in 2019. Reservation benefits were given for the first time to economically weaker sections in the Hindu [unreserved] community without counting caste as the only criterion. The 10% reservation for EWS introduced economic backwardness into the policy framework, albeit within a limited scope.

8. WELFARE STATE PERSPECTIVE:

The Welfare State Perspective views the state as responsible for promoting social welfare, reducing inequalities, and protecting vulnerable populations. According to this perspective, governments must intervene in economic and social processes to ensure equitable distribution of opportunities and resources[25].

Reservation aligns closely with welfare state principles because it seeks to improve the socio-economic conditions of disadvantaged groups. Through targeted interventions in education, employment, and political representation, the state promotes social welfare and inclusive development[26].

The Indian Constitution incorporates several welfare-oriented provisions, including Directive Principles of State Policy, which emphasize social justice, economic equality, and protection of weaker sections. Reservation can therefore be understood as a welfare mechanism designed to achieve constitutional goals and strengthen democratic governance.

9. ACHIEVEMENTS OF RESERVATION POLICY:

1. The social mobility and reservation policies have opened the doors of government jobs and government institutions to marginalized groups such as Scheduled Castes, Scheduled Tribes, and Backward Classes, creating a growing middle class and ensuring their economic security.
2. This policy has helped lead higher education enrolment
3. Rates for disadvantaged communities, creating greater opportunities for personal and professional development.
4. This reservation policy ensured representation of different sections of society which seems to be very important and essential for a democratic and coherent system.
5. This reservation policy has played a special role not only in the case of Scheduled Castes and Scheduled Tribes but also in the field of women empowerment. 33% Reservation in Panchayati Raj has given marginalized communities a voice in local governance which has significantly empowered women. They have also been given the opportunity to provide leadership.

10. CRITIQUES AND CHALLENGES:

1. However, in many cases, the benefits of reservation have not reached all disadvantaged or backward groups. In many cases, only the relatively well-off families among these groups have benefited the most. This is one of the limitations of reservation policies.
2. Many also believe that this reservation policy has not been able to make the merit-based scholarship selection process fair.

As a result, the quality of selection has deteriorated in all cases.

3. Many people also remember that this reservation system has greatly encouraged social inequality. These policies aimed at correcting inequality have become a source of social tension. Caste discrimination has increased greatly in society.
4. These reservation policies have been used by political parties in various ways for their own interests, resulting in the implementation of this reservation system for political purposes rather than for the long-term development and equity of the backward classes.

11. CONCLUSION:

The draft Constitution of India did not contain any provision for reservation for socially and educationally backward classes. Later, provision for reservation for socially backward classes was added in Article 15(4). The government's goal was to improve the educational status of the lower caste people, known as Dalits. The government introduced several amendments to improve the educational status of this Dalit class. In this regard, the 90th Amendment to the Constitution of India came into effect on 20 January 2006 and allows the government to make special provisions for admission of citizens belonging to any socially and educationally backward class in state-aided educational institutions, including private educational institutions.

The reservation policy in India continues to be a vital instrument for promoting social justice. However, to remain effective, it must adopt to the evolving socio-economic landscape. Its true success lies not only in offering quotas, but in dismantling entrenched structures of exclusion and ensuring genuine equality of opportunity.

The guiding principles of the Indian Constitution—justice, liberty, equality, and fraternity—call for affirmative action policies that carefully balance the legacy of caste-based discrimination with contemporary economic disparities. When reimagined thoughtfully, reservation can transcend its role as a compensatory tool and emerge as a transformative force—fostering national unity

and advancing the vision of an inclusive, egalitarian society.

The argument of my research will therefore analyse the need of economy-based reservation instead of caste-based reservation, because later in the long run, enhance caste discrimination, the eradication of which is the aim of socialism. Economy based reservation is expected to minimise the gaps between the richer and poorer sections and will enhance the country's progress by eradicating unemployment and poverty.

Lastly, it can be said that this reservation policy has been adopted with the aim of playing a positive role in society. In this regard, we can refer to John Rawls's principle of "Justice as Fairness". Based on Article 21A of the Constitution of India, which establishes education as a fundamental rights, education and reservation are linked through India's constitutional provisions and legislation, such as Article 15(5) of the Constitution and the Right to Education (RTE) Act 2009, which mandates reservation for Scheduled Castes (SC), Scheduled Tribes (ST), and Socially and Educationally Backward Classes (SEBC) in educational institutions to promote social justice and access for historically disadvantaged groups. This linkage is implemented through quotas in government and some private schools and colleges, though the exact percentages and applicability vary.

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