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RESERVATION (AFFIRMATIVE ACTION OF THE STATE VS. MERITOCRACY: A CLASH BETWEEN STATE'S DUTY TO ENSURE EQUALITY AND INDIVIDUALS RIGHT TO EQUAL OPPORTUNITY)

AUTHORED BY - KANUPRIYA BHARGAVA

Dharmashastra National Law University Jabalpur, Madhya Pradesh

INTRODUCTION:

CAN A STATE PREFER SOME TO TREAT ALL AS EQUALS?

Can a constitutional democracy ever justify reserving seats, jobs, or benefits for groups without betraying the promise of equal opportunity? A familiar objection claims that such measures sacrifice 'merit'—a shorthand for exam scores, grades, interview scores, or other competitive indicators that are supposed to reflect desert. Yet this objection assumes that all candidates travel the same road to reach the examination hall. This assumption is historically false, sociologically thin, and constitutionally incomplete. The question is therefore not whether reservation violates equality, but rather what account of equality is at stake.

Traditional liberal accounts of equality treat like cases alike. If two students sit for the same exam on the same day, the rule says: choose the one with the higher marks. This is intuitively attractive, administratively convenient, and easy to defend in casual debate. But it hides the pre-exam story: unequal schooling inputs, social prejudice, nutritional gaps, language barriers, geography, generational wealth, and the policing of aspiration. When these are unequal, a supposedly neutral test becomes a filter that launders structural privilege into the language of 'merit'.

Public law requires us to widen the frame. Institutions do not emerge in a vacuum. They are built inside societies that already contain hierarchies. When the state promises equality, it is not merely promising neutrality going forward; it is also promising to dismantle those hierarchies so that citizenship is meaningfully equal and not merely formally equal. At that point, selective, group-conscious tools such as reservations, quotas, or plus-factors begin to look less like favors and more like instruments of institutional repair. The crucial task is to decide how far those tools may go and what safeguards must accompany them.

This paper develops that task in four steps. First, it maps the theoretical terrain: formal equality versus substantive equality, and why the latter is indispensable for genuine fairness. Second, it examines India's jurisprudence and policy architecture as a laboratory of group justice. Third, it contrasts other jurisdictions—the United States, South Africa, and the European Union—to extract common limits and design conditions. Finally, it proposes specific accountability mechanisms that protect institutional standards while still fulfilling the constitutional duty to include historically excluded groups.

THEORETICAL FRAMEWORK: EQUALITY AND JUSTICE

To understand reservation, we must distinguish between two understandings of equality. Formal equality demands identical treatment: do not draw distinctions between citizens. Substantive equality demands that we ask whether apparently neutral rules reproduce historic exclusion or, instead, correct it. Substantive equality is therefore forward-looking and remedial. It treats law as a tool to change social reality rather than simply reflect it.

Justice, in this view, is not exhausted by procedural fairness now of selection. It also asks whether society has equipped individuals to compete. A purely exam-based, supposedly 'meritocratic' filter can be unjust if it ignores that the exam itself is better aligned with the culture, language, and pedagogy of dominant groups. A substantive conception of justice accepts that the state may need to rebalance inputs—through scholarships, preparatory programs, bridge courses, contextual evaluation, and yes, reserved seats—to ensure that competition is not a performance of inherited hierarchy.

The concept of 'merit' must also be interrogated. Merit, in law and policy, is not a natural fact. It is an institutional prediction: if we admit or hire this candidate, will they perform well in this role and serve the institution's mission? The inputs we use to make that prediction—standardized tests, prior grades, interview polish, internship pedigree—are all socially coded. They measure not only raw ability but also access to coaching, networks, and cultural fluency. When we acknowledge this, reservation stops looking like dilution and starts looking like recalibration of an already biased predictive instrument.

Finally, any defensible theory of equality must engage dignity. Exclusion is not merely economic. It communicates that certain communities are naturally unsuited for leadership,

knowledge, or authority. Corrective measures, therefore, must have a dignitary dimension: not charity, but recognition as full bearers of civic worth.

This dignitary logic is explicit in South African equality jurisprudence and implicit, though often contested, in Indian constitutional practice.

INDIA: SUBSTANTIVE EQUALITY AND GROUP JUSTICE

India offers one of the world's most developed legal architectures of reservation. The constitutional scheme treats social groups that have suffered historical discrimination and chronic under-representation in education and public employment as entitled to targeted inclusion measures. Importantly, this is articulated not as permanent charity but as a route to equal citizenship: groups whose exclusion is structural cannot realistically catch up in a single generation without structural help.

Indian courts have sustained the basic legitimacy of reservation while insisting on limits. First, the beneficiary class must be defined through intelligible criteria such as documented backwardness and inadequate representation. Second, there are numerical ceilings to prevent the system from becoming an unbounded spoils arrangement. Third, the state is expected to periodically review who benefits, to ensure that the most empowered within an otherwise disadvantaged class (often called the 'creamy layer') do not appropriate the entire benefit and transform an anti-discrimination tool into an intra-group privilege.

This approach reveals a sophisticated logic: equality is a positive duty. The state is not merely told "do not discriminate." It is told "intervene, design, monitor so that marginalized groups can genuinely enter power-bearing institutions." In that sense, Indian public law openly acknowledges structural caste and class realities that other liberal democracies sometimes downplay. However, it also embeds procedural safeguards—rational classification tests, quantitative proportionality, data-driven review—to counter f e a r s o f arbitrariness.

Current Indian debates extend beyond entry to questions of promotion in public employment, intersectional disadvantage faced by women from marginalized castes or tribes, and the growing demand to incorporate economic criteria. Critics argue that economic poverty cuts across caste lines and should independently ground affirmative action. Supporters of the

traditional model respond that while poverty matters, caste-based exclusion operates even when individuals gain income, because the stigma of caste can still block advancement, mentorship, and leadership visibility. A mature equality policy may need both lenses: caste-linked structural repair and economic vulnerability screens.

“Equality is not a demand for identical treatment; it is a claim to restructure institutions so that like capacity can flourish.”

UNITED STATES: FROM PERMISSIVE DIVERSITY RATIONALES TO SKEPTICISM

In the United States, the constitutional conversation has largely shifted from overt remedial racial quotas toward race-neutral or race-indirect mechanisms. Earlier jurisprudence tolerated limited, carefully tailored consideration of race in higher education admissions to achieve the educational benefits of diversity. The underlying narrative was not historical reparation alone, but pedagogical value: students learn more in a heterogeneous environment, democratic leadership pipelines widen, and stereotypes are undermined through contact.

More recent decisions reflect rising skepticism. Courts now demand that any race-conscious measure satisfy strict scrutiny: it must serve a compelling interest and be narrowly tailored, with no workable race-neutral alternative. Explicit point systems or automatic set-asides are viewed as too blunt. Instead, universities experiment with proxies like ‘first-generation college student’, ‘high-poverty school district’, or ‘overcoming exceptional adversity’. Percentage plans that guarantee admission to top students from every public high school, regardless of absolute test score, are another attempt to pursue representation through formally race-neutral design.

The American story supplies two lessons to comparative constitutionalism. First, even a system rhetorically committed to color-blindness quietly acknowledges structural disadvantage and tries to correct for it through indirect tools. Second, where courts treat any explicit group classification as presumptively suspect, the burden on institutions to gather data, justify goals, and show constant review becomes extremely high. That burden itself becomes a governance tool, forcing periodic self-scrutiny.

SOUTH AFRICA: EQUALITY AS TRANSFORMATION

South Africa's constitutional order emerged from a legally enforced racial hierarchy. Unsurprisingly, its equality clause explicitly authorizes 'positive measures' to advance persons disadvantaged by unfair discrimination. The key idea here is transformation: equality is not simply the absence of apartheid-era laws, it is the active restructuring of institutions so that historically excluded communities are genuinely present in decision-making spaces.

Courts in South Africa, therefore, do not treat affirmative measures as suspicious by default. Instead, they ask whether the measure is reasonably capable of promoting the achievement of equality and whether it is proportional. Proportionality in this context does not mean a mathematical formula; it means that the preference should not be arbitrary, unlimited, or detached from the real conditions of exclusion in that field. For example, a police hiring quota aimed at producing a force that reflects the population's racial demographics can be justified by the need for public trust and legitimacy in policing.

South Africa's model foregrounds dignity. The constitutional narrative states in plain terms that historical subordination produced material dispossession, political voicelessness, and symbolic humiliation. Remedial measures are therefore seen as restoring equal dignity, not handing out compensation. This overt moral vocabulary contrasts with the more technocratic tone in the United States and the often data-heavy defensiveness in India. It also clarifies that merit is not abandoned; rather, merit is re-evaluated in light of what the institution actually needs to serve a democratic society.

EUROPEAN UNION: NARROW, CONTEXT-BOUND POSITIVE ACTION

European Union equality law allows what is often called 'positive action': targeted advantages for under-represented groups, especially in employment and gender equality, so long as two safeguards exist. First, the preference ordinarily operates as a tiebreaker or plus-factor among candidates who are all objectively qualified.

Second, the system retains an escape valve: an individual who is not part of the preferred group can still be selected if they show objectively superior merit for the preferred group can still be selected if they show objectively superior merit for the specific post.

This tie-breaker model is important. It rejects mechanical quotas that ignore individual merit, but it also rejects pure formalism that pretends under-representation will fix itself. By operating at the margins of close cases, EU law attempts to change aggregate representation over time without erasing competition between qualified applicants. The legitimacy of these measures' rests on evidence of chronic under-representation and on transparency in how the tiebreaker works.

One critique of the EU approach is that it may move too slowly where disadvantage is very deep. If women, ethnic minorities, or Roma communities are structurally excluded from entire sectors, incremental tiebreakers may not generate meaningful presence in leadership within a realistic timeframe. Still, the EU model is influential because it demonstrates how affirmative measures can be reconciled with a strong cultural commitment to individualized assessment.

Rethinking 'Merit': Predictive Validity and Fairness Over Time

Public debate often treats 'merit' as self-evident: the highest score wins. But from an institutional design perspective, we must ask a deeper question: does that score actually predict future performance in the role we care about? If a medical college only selects students who excel at multiple-choice physics questions, does that reliably predict bedside skill, empathy under stress, and ethical judgment with patients? If a civil service exam rewards polished English essays written in a particular idiom, does that necessarily identify the best future district administrators for rural areas?

Empirical work in education and labour economics repeatedly shows that standardised scores eventually hit diminishing returns as predictors. Past a certain threshold of competence, other traits-resilience, contextual problem-solving, ability to navigate social reality, capacity to learn fast-matter enormously. The tragedy is that traditional filters often interpret those 'other traits' through elite-coded signals like internships, extracurricular polish, or 'leadership experiences' that were only available to candidates with money, time, and freedom from discrimination.

Modern affirmative action tries to update the prediction model. Instead of assuming that one exam captures everything, it builds a portfolio view: exam performance, school context, socio-economic obstacles overcome, community leadership, and evidence of growth potential. The goal is not to drop standards; it is to redefine standards so that they better match what the institution actually needs to serve the public interest in the long run.

DESIGN PRINCIPLES FOR RESERVATION SCHEMES

A constitutionally durable reservation policy needs clarity of purpose. The state must say out loud whether the aim is historical remediation, representational fairness in state institutions, diversity in educational experience, or service delivery in neglected regions. Blending goals without admitting it confuses courts and fuels political backlash. Clear articulation of goals also allows courts to test proportionality: is this scheme built to achieve the stated aim?

Next, eligibility must track disadvantage as cleanly as possible. This is where exclusion of the ‘creamy layer’ in India comes from: if a sub-group has already converted historical disadvantage into stable socio-economic security, continuing to priorities that sub-group may no longer be proportionate. Similar logic appears in EU-style tie-breaker systems that pause or suspend special treatment once representation gaps narrow.

Finally, design must include institutional support after entry. Reservation without mentoring, bridge courses, exam support, or a fair internal evaluation culture can set up beneficiaries to fail and then use that failure to ‘prove’ that reservation dilutes standards. A serious equality project therefore budgets for support and demands accountability from institutions, not just from entrants.

ADDRESSING COMMON OBJECTIONS

Objection from efficiency: reservation will drag down quality. The response is that properly implemented schemes do not admit unqualified candidates; they broaden the pool of qualified candidates by recognising multiple indicators of potential. Where minimum thresholds and rigorous training exist, cohorts tend to converge in performance over time. In many professional settings, candidates who entered through affirmative schemes later become mentors precisely because they understand how to navigate adversity in service delivery contexts.

Objection from stigma: beneficiaries are labelled ‘quota candidates’ and face doubt. This stigma is real and cannot be dismissed. The answer is cultural as much as legal. Institutions must celebrate diverse forms of excellence, showcase success stories, and publicly emphasise that the selection process continues to require competence. Quietly benefiting from social privilege has never generated stigma; only visible correction does. That double standard needs to be called out.

Objection from permanence: once created, reservations never end. The appropriate response is to embed sunset clauses and periodic impact reviews. Data dashboards can track representation and performance outcomes. When durable parity is reached and sustained, the legal presumption should shift toward tapering. This keeps the system honest and rebuts the narrative that affirmative measures are designed to last forever regardless of social change.

MEASURING IMPACT: A POLICY EVALUATION TOOLKIT

Measuring success requires more than counting how many reserved seats were filled. Institutions should track admission rates, course completion rates, graduation or promotion rates, leadership appointments, and post-placement outcomes for beneficiaries and non-beneficiaries alike. If gaps close over time, the intervention is working. If gaps persist, the state must ask whether the bottleneck is in preparation, campus climate, evaluation bias, or post-entry support.

Independent audits are essential. Internal reporting alone invites accusations of self-serving data. Third-party academic or ombud-style review builds trust in the numbers. Those audits should be published in accessible language so that the broader public can see both the achievements and the remaining challenges. Democratic legitimacy in affirmative action grows when the public can trace a line from law to outcome, not just from politics to promise.

Finally, evaluation should include climate surveys on belonging and respect. Formal inclusion without social dignity is hollow. If beneficiaries routinely report harassment, tokenization, or exclusion from leadership tracks, then the institution is not yet fulfilling the constitutional promise even if headline representation numbers look improved.

COMPARATIVESYNTHESIS: CONVERGING ON CALIBRATED INCLUSION

Despite doctrinal differences, India, the United States, South Africa, and the European Union show an emerging convergence. All jurisdictions recognize, at least implicitly, that history and structure shape who reaches positions of influence. All insist that the state (or state-like actors such as public universities) may not be blind to that reality. And all impose guardrails—proportionality in South Africa, strict scrutiny in the United States, creamy-layer logic and rational classification tests in India, and tie-breaker safeguards in the European Union— to

prevent affirmative measures from mutating into unchecked patronage.

This convergence suggests that the real battle is not “reservation versus merit,” but “what counts as merit, and who gets to define it?” If merit is defined solely by metrics historically optimized for dominant groups, then insisting on ‘pure merit’ simply locks in historic advantage. If merit is redefined to reflect the actual mission of the institution—public service, plural leadership, technical skill plus social competence—then inclusive selection can actually improve institutional performance and legitimacy.

Another shared lesson is transparency. Across jurisdictions, affirmative measures are most stable when the public understands their goal, scope, review cycle, and success metrics. Secrecy breeds conspiracy theories and resentment. Visibility, even where numbers are politically uncomfortable, builds an adult conversation about fairness.

INSTITUTIONAL AUTONOMY AND CONSTITUTIONAL ACCOUNTABILITY

Universities, professional colleges, and civil services often claim a special autonomy to define excellence. That autonomy matters; it allows domain experts to choose future professionals. But in constitutional democracies, public institutions also carry duties to model equality. The state cannot fund, regulate, and legitimise an institution that then reproduces social exclusion in the name of ‘autonomy’.

A sensible settlement balances both imperatives. Institutions retain latitude to craft entry standards, training regimes, and evaluation rubrics that suit their mission. In return, they must justify those standards in terms consistent with constitutional equality, submit to periodic review, and publish data on representation and outcomes. This transforms autonomy from an escape hatch into a responsibility-bearing privilege.

Courts have a delicate role here. Heavy-handed judicial micromanagement can paralyse academic institutions. But complete judicial hands-off deference can entrench exclusion. The best practice, visible in comparative jurisprudence, is for courts to demand transparency, rational connection to equality goals, and good-faith review cycles—without dictating the precise pedagogical formula.

ECONOMIC CRITERIA AND INTERSECTIONAL DISADVANTAGE

Economic disadvantage undeniably shapes opportunity. Poor students from historically advantaged groups also face genuine barriers. A fair equality regime cannot ignore that. However, many societies—particularly caste-stratified or racially stratified ones—observe that social stigma and network exclusion persist even when an individual household climbs the income ladder. A well-off member of a historically stigmatized caste may still be denied informal mentorship, leadership grooming, and social trust.

This is where intersectionality matters. Instead of pitting ‘caste’ versus ‘class’ or ‘race’ versus ‘poverty’, advanced systems use layered criteria. Socio-economic screens ensure relief for the poor, while group-based screens acknowledge stigma and structural lockouts that money alone cannot dissolve.

Properly calibrated, intersectional design reduces over-inclusion at the top and under-inclusion at the bottom, by directing the strongest preference to those sitting at the crossroad of multiple disadvantages.

In practical terms, that means periodically updating data on who is still excluded from higher education, skilled public employment, judicial clerkships, research positions, and leadership training. It also means being honest when certain sub-groups have achieved stable parity and thus may need less intensive preference going forward. Equality, in this sense, becomes a dynamic governance project rather than a frozen list of beneficiaries.

PRIVATE SECTOR AND PUBLIC PURPOSE

Many twenty-first century public functions are performed through private or quasi-private bodies: contractors delivering welfare services, hospitals running public-health programmes, ed-tech firms shaping access to knowledge, and security companies working with the state. If equality is a constitutional value, can the state demand diversity or affirmative outreach from these partners? Comparative practice suggests a cautious yes.

One technique is to make certain forms of inclusion a condition of receiving public funds or public contracts. Another is mandatory diversity disclosure: firms that bid for critical state work must publish workforce composition and diversity efforts. A softer tool is reputational leverage—the state can highlight best-performing private partners on inclusion metrics,

encouraging market and civil-society pressure on laggards.

This approach raises its own constitutional questions. How far can the state export its equality duties into the private sphere without violating freedom of association or contract? The emerging answer is that transparency and incentive alignment are safer than coercive quotas in purely private domains, but that stronger obligations are justified where private actors are essentially performing a public function or delivering a public good.

TRANSPARENCY, DATA, AND DUE PROCESS

Procedural fairness is the constitutional glue that holds affirmative action together. Every candidate—beneficiary or otherwise—deserves to know the rules of selection, the weight of each factor, and the reasons for an adverse decision. Secret lists, opaque point systems, or discretionary ‘management quotas’ erode trust and hand ammunition to critics who claim the system is pure patronage. Publishing criteria and cut-offs does not just defend the institution in court; it also educates the public about why the policy exists.

Due process also protects those who were not selected. If a general-category candidate challenges a reserved-category hire, or a reserved-category candidate alleges improper exclusion, there should be an appeal channel with an independent reviewer and a written, reasoned decision. That review process disciplines administrators, deters corruption, and clarifies borderline cases for future rounds.

Finally, data transparency (within privacy limits) is essential for democratic legitimacy. Annual public reports should state how many candidates were considered, selected, retained, promoted, and how performance outcomes compare across cohorts. If a programme is not working, the answer is not to quietly bury the numbers; it is to revise the programme with evidence on the table.

THE ETHICS OF SELECTION: DIGNITY AND BELONGING

Affirmative action opens the institution’s front door, but dignity determines what happens in the hallway. If beneficiaries enter only to be isolated, mocked, or stereotyped as ‘quota candidates’, the institution has failed its constitutional mission. Belonging is not ornamental; it is an operational precondition for success because people who are chronically undermined cannot fully develop or showcase their ability.

Ethical selection therefore requires ethical aftercare. Mentorship programmes, peer-support cohorts, and explicit zero-tolerance policies for harassment are not ‘extra favours’; they are extensions of the constitutional promise that all citizens may aspire to leadership. A police academy that recruits from historically excluded communities but then ridicules those recruits in training is not inclusive in any meaningful sense.

Institutional culture can change. Celebrating diverse excellence—whether in community engagement, crisis management, field empathy, technical mastery, or academic research—signals that the institution values multiple dimensions of contribution. That signalling, repeated consistently, chips away at stigma and normalises plural leadership.

GUARDRAILS AGAINST OVER- AND UNDER-INCLUSION

Any reservation regime faces twin failure modes. Over-inclusion occurs when benefits flow to sub-groups that have already achieved substantial security and influence, turning an equality tool into a hereditary entitlement. Under-inclusion occurs when genuinely vulnerable sub-groups remain invisible because they are numerically small, geographically remote, or politically marginal.

Guardrails must address both risks. Creamy-layer exclusions, periodic socio-economic surveys, and micro-level audits (for example, looking specifically at representation of women from certain tribes in district hospitals or magistracies) help detect over- and under-inclusion. Where over-inclusion is found, benefits should taper. Where under-inclusion persists, more targeted outreach, scholarships, preparatory academies, or even micro-reservations may be justified.

These guardrails are not a luxury. They are essential to maintain public confidence. When voters see that affirmative programmes are self-correcting, principled, and data-driven, backlash loses energy. When voters think the programmes are permanent, political handouts, resentment grows and constitutional consensus erodes.

ROADMAP FOR REFORM

A reform roadmap for a modern equality state could include: (a) a unified ‘equality impact code’ requiring every major public institution to publish representation baselines, goals, and timelines; (b) an independent data panel with audit powers;

mandatory five-year reviews for all reservation schemes with presumptive tapering triggers; (d) statutory budgeting for bridge programmes and mentoring so that support is not left to charity; and (e) institution-wise ‘parity indices’ that indicate how close we are to durable equality in access, retention, and promotion.

Such a roadmap turns affirmative action from a vague moral project into a technocratic governance project with milestones. It reassures sceptics that the state is not writing a blank cheque. It also reassures beneficiaries that inclusion is not a gift subject to the mood of the majority but a structured constitutional obligation grounded in evidence.

Perhaps most importantly, a roadmap makes equality iterative. Instead of freezing the debate at “for” or “against” reservation, it invites continuous improvement: Which indicators best predict public-serving excellence? Which communities remain locked out? Which tools (scholarships, quotas, mentoring, economic aid) actually work in which sectors? This turns public argument toward problem-solving and away from identity warfare.

CONCLUSION AND RECOMMENDATIONS

Reservation and meritocracy are not natural enemies. They only appear to clash when merit is defined narrowly and a historically. If we accept that institutions exist inside unequal societies, then affirmative measures can be understood as instruments for discovering and cultivating talent that standard filters routinely miss. Well-designed schemes do not discard competence; they reveal it in places where structural discrimination tried to keep it invisible.

The recommendations are therefore pragmatic. First, define the constitutional objective of each scheme with precision. Second, tie eligibility to demonstrable disadvantage—social, economic, or both—with regular review and creamy-layer style recalibration. Third, preserve competition among qualified candidates and maintain rigorous training and evaluation standards post-entry. Fourth, fund mentoring and bridge support so that inclusion succeeds in practice, not just on paper. Fifth, build transparent data audits, appeal rights, and public reporting.

Sixth, embed sunset and tapering triggers so that the system remains credible, adaptive, and responsive to social change.

When these recommendations are implemented together, affirmative action ceases to look like an attack on merit. It becomes the constitutional technology through which a democracy keeps its promise: that birth will not dictate destiny, and that public institutions will look like, listen to, and serve the whole people.

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