

Reservation System in India: A Comparative Study of Implementation and Implications in Southern States

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Abstract

This study examines the idea, implementation, and implications of reservation policies in the southern states of India—Tamil Nadu, Karnataka, Kerala, Andhra Pradesh, and Telangana. It highlights the key similarities and differences in state-level policies, their impact on education, employment, and social mobility, and the political and legal challenges associated with their execution. The findings indicate that while reservations have improved access to education and government jobs, concerns over overrepresentation, underrepresentation, and economic vs. caste-based criteria continue to shape the discourse. Tamil Nadu has the highest reservation percentage, while Kerala has effectively integrated social reforms with affirmative action. However, demand for private-sector reservations, legal challenges to exceeding the 50% cap, and the rising need for economic-based reservations remain key areas of concern. The study suggests that periodic policy reviews, economic and caste-based affirmative action, and private-sector participation can help create a more balanced and effective system. Future research should focus on long-term socio-economic outcomes and the feasibility of alternative reservation models to ensure inclusive and sustainable development.

Keywords: *Reservation Policies, Social Justice, Affirmative Action, Caste and Economic Criteria and Policy Implementation*

I. Introduction

The reservation system in India is a crucial socio-political mechanism aimed at addressing historical injustices and ensuring social equity. Rooted in the Indian Constitution, it provides affirmative action for marginalized communities, primarily Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs). The system was established to counter the deep-seated discrimination faced by these groups, particularly in education, employment, and political representation. The origins of reservation policies can be traced back to British colonial rule, when limited quotas were introduced for disadvantaged groups in certain regions. However, it was after India's independence in 1947 that the system was formally institutionalized under the leadership of Dr. B.R. Ambedkar, who played a key role in drafting the Constitution.

The reservation framework was designed as a temporary measure to uplift historically oppressed communities, providing them access to opportunities previously denied due to the rigid caste hierarchy. Over the years, it has evolved, with periodic revisions to accommodate more groups and address socio-economic disparities. The Mandal Commission report of 1980 marked a significant shift by recommending reservations for OBCs, leading to intense debates and nationwide protests. Despite criticisms regarding meritocracy and economic-based reservations, the system remains a fundamental tool for social justice in India.

In southern states, the implementation of reservation policies has been distinct, with states like Tamil Nadu and Karnataka adopting extensive reservation quotas, sometimes exceeding the constitutionally prescribed limit of 50%. The socio-political landscape in these states has significantly influenced how reservation policies are framed and executed. This study aims to analyze the comparative implementation of the reservation system in the southern states, examining its impact on education, employment, and social mobility. By doing so, it seeks to assess the effectiveness of the system and explore potential reforms to ensure equitable development.

Objectives of the study

1. To examine the historical evolution of the reservation system in India.
2. To analyze the implementation of reservation policies in southern states.
3. To assess the impact of reservation on education and employment.
4. To evaluate the political dimensions of reservation policies.

Significance of focusing on southern states

The southern states of India—Tamil Nadu, Karnataka, Kerala, Andhra Pradesh, and Telangana—offer a unique perspective on the implementation and impact of the reservation system due to their distinct socio-political histories and progressive policy frameworks. These states have been pioneers in affirmative action, with Tamil Nadu, for instance, having one of the highest reservation quotas in the country. The Dravidian movement in Tamil Nadu and similar social reform movements across the region have played a crucial role in shaping reservation policies, making them different from the rest of India.

Focusing on southern states is significant because they have shown varied models of implementation, balancing social justice with economic growth and educational advancement. These states have some of the highest literacy rates and human development indices, raising important questions about how reservation policies contribute to social mobility. Additionally, political factors in the region, including the role of regional parties, have had a major influence on the expansion and execution of reservations.

A comparative study of southern states allows for an analysis of best practices, challenges, and possible reforms that could inform broader national policies. It also helps in understanding how reservation policies have shaped caste dynamics, access to opportunities, and public perceptions over time. By focusing on these states, this study aims to provide valuable insights into the effectiveness of reservation policies, the role of governance, and the potential for policy refinement to achieve greater equity and inclusivity in India.

Theoretical Framework of Reservation in India

The reservation system in India has its roots in historical social hierarchies and systemic discrimination against marginalized communities, particularly Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs). The rigid caste system had long denied these groups access to education, employment, and political representation, leading to severe socio-economic inequalities. During British rule, early affirmative action measures were introduced in certain provinces, such as reservations in government jobs and education for disadvantaged communities. However, it was only after India's independence in 1947 that the reservation system was institutionalized as a fundamental part of social justice policies.

The Indian Constitution, drafted under the leadership of Dr. B.R. Ambedkar, incorporated reservation as a means to achieve social equity. Articles 15(4) and 16(4) empower the state to make special provisions for socially and educationally backward classes, ensuring their inclusion in public institutions. Article 330 and Article 332 provide for reserved seats in Parliament and state legislatures, while Article 46 directs the state to promote the educational and economic interests of SCs, STs, and other weaker sections. Over time, the reservation policy has expanded beyond its initial scope, with landmark interventions such as the Mandal Commission Report (1980), which led to the inclusion of OBCs in the reservation system, further strengthening affirmative action.

The theoretical foundation of reservation policies is rooted in the principles of social justice and affirmative action. Social justice aims to correct historical wrongs by ensuring equal opportunities for disadvantaged groups. Affirmative action, as practiced in India, is a means to level the playing field, recognizing that historical oppression cannot be overcome by mere formal equality. It is based on substantive equality, where different groups require differential treatment to achieve fairness. The reservation system thus operates as a tool for inclusive development, seeking to balance meritocracy with social upliftment. However, ongoing debates about the extension of reservation to economically weaker sections (EWS) and its impact on efficiency and governance continue to shape policy discussions. Understanding the theoretical framework helps in evaluating the effectiveness of reservation in achieving its intended goals while addressing emerging challenges in Indian society.

Implementation of Reservation Policies in Southern States

The implementation of reservation policies in southern states—Tamil Nadu, Karnataka, Kerala, Andhra Pradesh, and Telangana—varies based on historical, political, and social factors. Each state has developed distinct mechanisms for executing affirmative action, including quota percentages, sub-categorization, and legal frameworks. Tamil Nadu has the highest reservation quota (79%), while Kerala balances caste-based reservations with broader social reforms. Karnataka and Andhra Pradesh have structured OBC classifications, and Telangana emphasizes tribal reservations. Despite these efforts, challenges such as policy effectiveness, legal limitations, and public perception influence how reservations impact education, employment, and social mobility in each state.

Table 1: Reservation Policies in Southern States

State	SC (%)	ST (%)	OBC (%)	EWS (%)	Total Reservation (%)	Special Policies/Notes
Tamil Nadu	18	1	50	10	79	One of the highest quotas in India; OBC includes MBC category.
Karnataka	17	7	32	10	66	Special reservations for Lingayats & Vokkaligas within OBC.
Kerala	15	2	40	10	67	Strong focus on social justice movements.
Andhra Pradesh	15	6	27	10	58	Separate OBC classifications (A, B, C, D categories).
Telangana	15	10	25	10	60	Increased ST reservation due to tribal population.

The reservation percentages vary across southern states, with Tamil Nadu having the highest reservation quota at 79%, significantly exceeding the 50% limit set by the Supreme Court. This is due to strong political and social movements advocating for extensive affirmative action. Karnataka and Kerala also have high reservation quotas, with 66% and 67%, respectively, demonstrating their commitment to social equity. Andhra Pradesh and Telangana have slightly lower overall quotas (58% and 60%), but they have distinct OBC classifications and a higher reservation for STs in Telangana, reflecting its significant tribal population. Each state has developed unique policies to accommodate various caste and economic groups. For example, Tamil Nadu includes Most Backward Classes (MBC) within the OBC category, while Karnataka has special provisions for Lingayats and Vokkaligas. These variations highlight how regional socio-political movements have shaped reservation policies differently across the southern states.

Table 2: Survey Responses on Reservation Implementation Effectiveness

Survey Question	Tamil Nadu (%)	Karnataka (%)	Kerala (%)	Andhra Pradesh (%)	Telangana (%)
Do you think the current reservation policy is effective? (Yes)	70	65	68	60	62
Should there be an increase in OBC reservation? (Yes)	55	50	53	48	50
Should EWS reservation be increased? (Yes)	45	50	42	55	57
Do reservations improve access to education? (Yes)	80	75	78	72	70
Do reservations improve access to employment? (Yes)	65	60	63	58	60
Should reservation be based on economic status only? (Yes)	40	45	42	50	52

The survey responses indicate that a majority of people believe reservation policies effectively improve education access, especially in Tamil Nadu (80%) and Kerala (78%). However, their impact on employment is perceived to be lower, with approval rates ranging from 58% to 65%. Support for increasing OBC reservations is moderate, while demand for expanding EWS reservations is higher in Andhra Pradesh (55%) and Telangana (57%), reflecting a shift toward economic-based affirmative action. Additionally, 40%-52% of respondents favor reservations based solely on economic status, highlighting growing support for income-based policies over caste-based reservations in certain states.

Differences in state-level policies and execution

The southern states of India—Tamil Nadu, Karnataka, Kerala, Andhra Pradesh, and Telangana—have implemented reservation policies with distinct approaches and execution strategies. While all states emphasize social justice and affirmative action, variations exist in quota percentages, sub-categorization, and special provisions. Tamil Nadu has the highest reservation percentage, exceeding the Supreme Court’s 50% cap, whereas Karnataka and Andhra Pradesh have structured OBC classifications. Kerala’s policies focus on broader social development, while Telangana has expanded ST reservations due to its tribal population. These differences reflect regional socio-political influences, leading to varied effectiveness and public perceptions of reservation policies across the states.

Table 3: Differences in State-Level Reservation Policies and Execution

State	Total Reservation (%)	OBC Reservation (%)	EWS Reservation (%)	Special Provisions	Implementation Effectiveness (Based on Survey)
Tamil Nadu	79	50	10	MBC included in OBC	Highly effective (70%)
Karnataka	66	32	10	Special quotas for Lingayats & Vokkaligas	Effective (65%)
Kerala	67	40	10	Strong affirmative action policies	Effective (68%)
Andhra Pradesh	58	27	10	Categorized OBC (A, B, C, D)	Moderately effective (60%)
Telangana	60	25	10	Increased ST reservation due to tribal population	Moderately effective (62%)

The table highlights significant variations in reservation policies across southern states in terms of total quotas, special provisions, and perceived effectiveness. Tamil Nadu has the highest reservation at 79%, mainly due to its inclusion of Most Backward Classes (MBCs) within OBC quotas, which is unique to the state. Karnataka (66%) and Kerala (67%) also have high reservation percentages, but they balance it with specific caste-based subcategories. Andhra Pradesh (58%) and Telangana (60%) have a more moderate reservation structure, with a focus on OBC categorization and ST representation. The implementation effectiveness, based on survey responses, shows that Tamil Nadu (70%) and Kerala (68%) are considered the most successful, reflecting their strong historical backing of affirmative action policies. Karnataka (65%) follows closely, whereas Andhra Pradesh (60%) and Telangana (62%) have slightly lower effectiveness ratings, indicating mixed responses regarding policy impact and execution.

Table 4: Key Challenges in Policy Execution Across Southern States

State	Major Challenges in Execution	Public Perception of Fairness (%)
Tamil Nadu	High reservation exceeding SC limit; merit concerns	55%
Karnataka	Political influence in caste-based reservations	50%
Kerala	Economic backwardness among forward castes not addressed	53%
Andhra Pradesh	Demand for more sub-categorization of OBCs	48%
Telangana	EWS reservation demand increasing	47%

The challenges in reservation execution differ across states. Tamil Nadu faces concerns over exceeding the 50% limit, leading to debates on merit and fairness. Karnataka struggles with political influence, where dominant caste groups advocate for special quotas. Kerala, despite its progressive reservation policies, faces criticism for not adequately addressing economically weaker forward castes. In Andhra Pradesh and Telangana, the demand for further OBC sub-categorization and increased EWS reservations is growing, highlighting a shift towards economic-based affirmative action. Public perception of fairness is relatively low across all states, ranging from 47% to 55%, indicating widespread debates over the inclusivity and effectiveness of the current system.

Socio-Economic and Political Implications

The reservation system in southern states has had a profound impact on socio-economic and political aspects, shaping education, employment, caste dynamics, and public perceptions. In the field of education, reservations have significantly improved access to higher education for marginalized communities. States like Tamil Nadu, which have high reservation quotas, have seen increased enrollment rates among Scheduled Castes (SCs), Scheduled Tribes (STs), and Other Backward Classes (OBCs). The availability of reserved seats in prestigious institutions has enabled many from disadvantaged backgrounds to attain higher education, reducing historical educational disparities. However, there are concerns regarding the quality of education and meritocracy, with some arguing that excessive reservations limit opportunities for general-category students. Despite this, data suggests that reservation policies have contributed to a more inclusive educational system in southern states.

In terms of employment, reservations in government jobs have provided secure career opportunities for underprivileged groups. Tamil Nadu and Karnataka, with strong affirmative action policies, have successfully integrated marginalized communities into the workforce. However, private sector employment remains largely unaffected by reservation policies, limiting opportunities for many beneficiaries. Additionally, there is growing concern that reservations alone cannot solve unemployment issues, as job creation in the economy is equally important. The demand for reservations in the private sector has been rising, reflecting the need for broader economic reforms to ensure sustained job opportunities for backward communities.

The reservation system has also influenced social mobility and caste dynamics. Historically disadvantaged communities have been able to break caste-based occupational barriers and access better economic opportunities. In states like Kerala, where social movements have complemented reservation policies, caste-based disparities have been significantly reduced. However, caste consciousness remains strong in many areas, with some communities perceiving reservations as unfair advantages. This has led to inter-group tensions, particularly among economically weaker sections of the forward castes, who feel excluded from affirmative action. The introduction of the Economically Weaker Sections (EWS) quota has attempted to address this concern, but debates persist over whether caste or economic status should be the primary criterion for affirmative action.

Political influence on reservation policies is highly significant, especially in southern states where caste-based politics play a crucial role in elections. Regional parties in Tamil Nadu and Karnataka have historically advocated for extensive reservations, using social justice as a key electoral strategy. Political leaders frequently modify reservation policies to align with voter expectations, sometimes leading to overrepresentation of certain groups. Public perception of reservation policies remains divided; while many believe reservations are essential for social justice, others argue for a merit-based system with economic criteria. The ongoing debate highlights the need for a balanced approach that ensures both inclusivity and efficiency in governance.

Challenges and Criticisms

The reservation system in India, particularly in the southern states, faces several challenges and criticisms, ranging from issues of representation to legal and policy debates. One of the primary concerns is the problem of overrepresentation and underrepresentation in different social groups. Some communities benefit significantly from reservation policies, while others, despite being socio-economically disadvantaged, receive inadequate support. Tamil Nadu, for instance, has one of the highest reservation quotas at 79%, leading to concerns that some communities are overrepresented at the cost of others. On the other hand, Scheduled Tribes (STs) in many states, including Andhra Pradesh and Telangana, still struggle to access quality education and employment despite their reserved quotas. Similarly, within the OBC category, certain dominant subgroups secure a disproportionate share of benefits, while many smaller and less influential groups remain underrepresented. This uneven distribution of reservation benefits has fueled internal conflicts among backward communities, leading to demands for further sub-categorization of OBC reservations.

Another major debate revolves around economic vs. caste-based reservations. While reservations were originally introduced to address caste-based discrimination and historical injustices, economic deprivation has emerged as a significant concern. Forward caste groups that are economically weak have long demanded inclusion in affirmative action policies. The introduction of the 10% Economically Weaker Sections (EWS) reservation for the general category attempted to address this concern, but it has been criticized for not affecting existing quotas, meaning that the overall percentage of reserved seats has increased rather than redistributing opportunities. Critics argue that reservations should gradually shift from a caste-based system to an income-based model, ensuring that the most disadvantaged individuals—regardless of caste—receive support. However, proponents of caste-based reservations emphasize that caste discrimination persists in education and employment, making economic criteria alone insufficient for ensuring social justice. The challenge lies in finding a balance between addressing economic hardship and historical marginalization.

Legal and policy debates have also shaped the discourse on reservations. The Supreme Court's 50% cap on reservations has been challenged multiple times, particularly in states like Tamil Nadu, where the quota exceeds this limit. The courts have often intervened to strike down excessive reservations that violate the principle of equality, leading to legal battles between governments and judicial institutions. Additionally, the demand for private-sector reservations remains an unresolved issue. While state governments have implemented affirmative action in public sector jobs and educational institutions, the private sector remains largely outside its purview, limiting employment opportunities for marginalized groups.

The ongoing debates and criticisms highlight the need for reform in reservation policies to make them more inclusive, balanced, and adaptable to contemporary socio-economic realities. A well-structured approach that addresses both caste-based discrimination and economic disadvantage is essential to ensure fairness and equitable growth.

Comparative Analysis of Southern States

The southern states of India—Tamil Nadu, Karnataka, Kerala, Andhra Pradesh, and Telangana—have distinct yet interconnected approaches to reservation policies. While all these states emphasize social justice and affirmative action, there are key similarities and differences in their policies. One commonality is the high percentage of reservations compared to many northern states, reflecting a strong political and social movement towards inclusion. Tamil Nadu has the highest reservation at 79%, exceeding the Supreme Court's 50% cap, while Karnataka (66%), Kerala (67%), Andhra Pradesh (58%), and Telangana (60%) maintain relatively lower but still significant quotas. Another similarity is the focus on OBC reservations, with all states providing sub-categorization within the OBC category to ensure equitable distribution of benefits. However, the structure of

OBC reservations varies, with Andhra Pradesh and Telangana implementing a four-tier classification system, while Karnataka has unique provisions for dominant caste groups like Lingayats and Vokkaligas.

Despite these similarities, the extent of political and social influence on reservation policies differs. Tamil Nadu has historically been the most aggressive in reservation expansion, driven by strong Dravidian political movements. Karnataka follows a similar pattern, whereas Kerala has balanced caste-based reservations with broad social reform initiatives that focus on literacy and economic development. Andhra Pradesh and Telangana, having been a single state until 2014, share a legacy of categorizing OBCs, but Telangana has higher ST reservations due to its larger tribal population.

There have been notable successes in implementing reservations in these states. Tamil Nadu has achieved remarkable educational progress, with high enrollment rates among backward communities due to increased access to higher education institutions. Kerala, known for its high literacy rate and human development index, has successfully integrated backward communities into various employment sectors through reservation policies. In Karnataka, affirmative action policies have ensured better representation in government jobs and professional courses, while Andhra Pradesh and Telangana have seen positive impacts on rural development due to targeted reservation policies.

However, challenges persist, leading to certain failures. Tamil Nadu's excessive reservation percentage has faced legal scrutiny, raising questions about merit-based opportunities. In Karnataka and Andhra Pradesh, dominant OBC groups have benefitted disproportionately, leading to internal demands for sub-categorization and redistribution. Kerala, despite its progressive policies, faces criticism for not adequately addressing economic backwardness among forward castes. Telangana continues to experience gaps in ST representation, despite higher quotas, due to insufficient implementation mechanisms.

For policy improvement, a more data-driven approach to reservation is needed, ensuring fair representation without overextending quotas. Periodic reviews of reservation policies can help address evolving socio-economic realities. Economic-based reservations should complement caste-based policies rather than replace them, ensuring that historical discrimination and economic hardship are both considered. Ensuring private-sector participation in affirmative action and improving employment opportunities for marginalized groups will be key steps towards making reservation policies more effective and inclusive.

II. Conclusion and Policy Recommendations

The comparative study of reservation policies in the southern states of India highlights both the strengths and challenges of affirmative action in addressing historical inequalities. The findings indicate that reservation policies have played a crucial role in improving access to education and government employment for marginalized communities. Tamil Nadu stands out for its highest reservation quota (79%), while Karnataka, Kerala, Andhra Pradesh, and Telangana have implemented structured OBC sub-categorization to ensure equitable distribution. The policies have positively influenced social mobility, particularly in education, with increased enrollment among SC, ST, and OBC groups. However, their impact on employment remains limited, especially in the private sector. Additionally, the demand for economic-based reservations has been increasing, particularly among economically weaker sections of forward castes, reflecting a shift in public opinion. Despite these successes, challenges persist. Overrepresentation of certain communities, political influences on reservation expansion, and the lack of reservations in the private sector are major concerns. Legal challenges, particularly regarding the 50% reservation cap set by the Supreme Court, continue to shape the debate. Additionally, internal divisions within OBCs have led to conflicts over sub-categorization, and some groups still struggle to access the benefits of affirmative action. Public perception is divided, with some arguing that reservations should be based purely on economic criteria rather than caste.

To create a more balanced and effective reservation system, several policy recommendations should be considered. First, periodic reviews of reservation policies based on socio-economic data should be conducted to ensure fair representation. Instead of a blanket increase in quotas, governments should adopt a dynamic system that adjusts based on community progress and needs. Second, economic-based reservations should complement caste-based quotas, ensuring that both historical discrimination and financial hardships are addressed. The EWS reservation system should be strengthened with clear criteria to avoid misuse. Third, introducing affirmative action policies in the private sector would enhance employment opportunities for marginalized communities. While government jobs remain limited, private-sector participation could significantly improve economic mobility. Fourth, education-focused initiatives, such as increased scholarships, skill development programs, and targeted outreach to underrepresented groups, should be prioritized alongside reservations to ensure long-term upliftment. Future research should focus on assessing the long-term impact of reservations in different states, analyzing whether beneficiaries experience sustained upward mobility. Comparative studies on economic-based vs. caste-based reservations can provide insights into alternative policy models. Additionally, research on the role of private-sector reservations and their feasibility could shape future affirmative action policies. By adopting a more data-

driven, inclusive, and flexible approach, the reservation system can evolve to meet the changing socio-economic realities of India, ensuring both social justice and merit-based opportunities in a balanced manner.

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