

MERITOCRACY – BETWEEN MYTH, NORM AND REALITY

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Abstract

Recently, the concept of meritocracy has been gaining importance in social sciences and media. Authors come to different conclusions on its importance for social (in)equality, mobility, education or (re)production of knowledge, and the relationship between experts, politics and public opinion.

While meritocracy means the »ruling« of a special group with certain characteristics, it should also be considered as a regulatory principle of human resources management that directs the selection of people for strategically important functions. The main question of this introductory and review article is the following: what is the significance, scope and the limitation of the meritocratic allocation of human resources in an emerging knowledge-based society, and how does it affect professional credibility (meritoriousness), social mobility, social (in)equality and wider socio-political context.

Key words: meritocracy, social mobility, education, knowledge, social capital, human capital

1 Introduction

Writing about meritocracy can be an ungrateful task, yet the concept and its implications provide an important starting point for research into the developmental trends of (post)modern societies and the changes occurring in social relationships. It is ungrateful especially due to the concept's ambiguity, as well as its multilevel and contextual variability. We may characterise it as a framing concept, the basis for discussing meaning and measuring knowledge, learning, and competencies for social development. In the last few years, meritocracy has entered discussions in many media and social sciences. A great deal of literature has accumulated, with authors reaching different conclusions and assessments about meritocracy's importance for social (in)equality, mobility, education or the (re)production of knowledge and the relationships between experts, politics and public opinion. This paper places emphasis on a concise presentation and evaluation of recent literature as a basis for the further discussion of different research starting points.

These starting points are:

- Meritocracy literally means the 'ruling' of a special group holding certain characteristics (we may call it a cognitive elite), but it is important to also address it as a regulatory/normative principle that directs and defines criteria for human resources management and the selection of people for strategically important (elite) functions.
- In contemporary societies – as well as in technologically and innovatively developed ones – meritocracy is not the sole regulatory principle, meaning that the main criteria for social promotion/vertical social mobility are knowledge, education and acquired competencies. Individual national societies/(macro) regions differ in the way they use and explain meritocratic principles. Further, they combine – and even substitute – them with other mechanisms and models of social organisation, such as clientelism, radical (populist) egalitarianism, financial-economic oligarchy (plutarchy) or mediocracy.

- Three things are visible in the analysed literature: a) some authors, especially those dealing with the USA and Great Britain (Anglo-Saxon area), seem not to distinguish between meritocracy and plutarchy or clientelism; or they hold the (wrong or one-sided) assumption that meritocratic regulation is the only mechanism/criteria for (im)mobility and elite position selection; b) these authors oppose meritocracy with a radical egalitarian model of society; c) a group of authors view the role of meritocratic regulation as more differentiated – they describe it as a positive normative construct ('myth') with wanted and unwanted consequences for social mobility and awards in a society.

To better understand the above starting points, here we steer the discussion towards meritocracy-related concepts that suggest the emergence and increased influence of cognitive elites, meaning strategic groups which are directing the development of society based on their techno-scientific and intellectual competencies. One of those concepts is technocracy, coined many decades ago, that describes a model of the technically-rational, pragmatic regulation of social processes and decisions. Next, we have the concept of scientocracy, the rule of science, connected to the penetration of the techno-scientific way of thinking in all pores of society. The term epistocracy has also emerged, stressing the dominant role of people possessing (scientific) knowledge in the sense of episteme (Runciman, 2019). Some authors speak of expertocracy as well (Mueller, 2017).

In the last decade, the thesis about the creation of the “creative class” (Florida 2002), which includes different kinds of knowledge (from engineering to artistic imagination) was at the forefront. Before then, the sociologist A. Gouldner, a critic of Parsons’ functionalism, developed a thesis on intellectuals assuming the main role in society and who are committed to the “culture of critical discourse” (Gouldner 1978). All of these concepts and descriptions indicate the emergence of a scientific society based on knowledge and innovation. Yet we should also be aware of the socialisation of science¹ (Adam, 2014). The question is: where are we today? Most likely, closer to the ‘postfactual society’ than to the knowledge society. This is visible in the last months in connection to the outbreak of the Covid-19 pandemic (Adam 2020; Horton, 2020).

2 On the ambivalence of the term “meritocracy” and different types of social organisation and regulation

Based on the opinion of several sociologists dealing with the theory of modernisation, and as explained by Talcott Parsons in particular (Adam 1991), modern, industrial and democratic societies are supposed to establish a meritocratic principle of personal ‘achievement’ instead of inherited (ascribed) status while selecting the most competent and talented people for leading positions in different subsystems. However, already in the first book that popularised and ironised the principle in the sense of dystopia (M. Young, 1958), there are doubts as to whether meritocracy does not in fact mean a new way of segregation, inequality reproduction and elitism².

¹ The term socialisation of science assumes that individuals and civil society are facing new risks and opportunities brought on by scientific and technological advancement, for example in the sense of ‘citizen science’. For more on this, see Adam and Tomšič 2018.

² In this context it is very instructive to read an article written recently by Toby Young, son of Michael Young, who coined and popularised the term of meritocracy. He says: “(Michael Young) as a former Communist who could never quite forget Marx’s historical materialism, he looked forward to the day when socialism would replace capitalism and feared that the meritocratic principle, by helping to legitimise socioeconomic inequality, would delay that new dawn”. His position is different from his father’s and is formulated as follows: “But I do

These doubts continue in parts of social sciences literature (Littler 2017; McNamee 2018; Markovits 2019; Mijs 2019; Sandel 2020), yet at the same time the idea of meritocracy is becoming ever more real in view of the development towards the post-industrial ‘knowledge society’. The concept is therefore inherently controversial and may be understood in the sense of elitism, that develops *unjust inequality* – it is particularly seen as such by the authors, who understand equality as equality of outcome, no matter the individual’s innate or nurtured capabilities (talent). However, it may also be understood in the sense of *just inequality* since it opens up possibilities for social mobility and promotion also for those from lower classes because the combination of talent and effort (which Young regarded as the basis for meritocracy) can lead to compensation for those with worse starting (economic) opportunities.

A possible definition is that meritocracy is, in the sense of the regulatory principle, a policy and technology of optimal human resources and human capital management. This is also the basis for the concept of the knowledge-based society and economy. It is important to add that contemporary societies are not simply based on the production and utilisation of knowledge or cognitive mobilisation (Adam 2014). In reality, other principles are also used, such as striving to achieve shareholder value (short-term profit), the domination of financial capital, loyalty, as well as the existence of rent-seeking groups. There are hierarchies and reproductions of power in the sense of retention elites that work on the basis of inherited advantages and social capital, which is used as a counterweight to human capital.

One might say we are dealing with multiple types of capital, not only human. Combining the theses of Coleman (1988) and Bourdieu (2004), we can also name social capital (emphasising the individual’s inclusion in networks that enable important resources and information), economic capital (wealth and access to financial resources) and symbolic capital in the sense of moral-ideological impact on wider society with different ideas of social transformation and fairness. There is a certain competition among these types of capital, yet also convertibility or synergy. Social capital can have the direct function of circulating knowledge and improving human capital. It can also have the opposite effect and permit individuals with less human capital to reach high positions in society based on their connections and loyalty.

On this basis and building on our own (Adam 2014) and international comparative studies (Outhwaite 2017), we can ideally-typically (M. Weber) describe four models of socio-economic formations or four types of regulatory principles: (1) the meritocratic society (as the systematic use of meritocratic principles and values where human capital comes first – it basically coincides with the ‘ideal’ knowledge society); (2) the clientelist society (based on relationships of loyalty and trade in the patron–client relationship; at the fore is one component of social capital, ‘binding capital’); (3) the plutarchic society (which emphasises the exclusivity of inherited financial capital, and means the rule of the super-rich or an economic-financial oligarchy); and (4) the egalitarian society that is legitimised by symbolic capital or the idea of fairness, understood as the elimination of all types of inequality, whether by way of levelling in society or as »Gleichschaltung« or in the sense of less radical or pragmatic ideas of social politics of the welfare state.

not believe in equality of outcome”. It can be said that some British (and American) social scientists are very close to Michael Young by asserting that meritocracy is a (ideological) device to justify the social inequality. They also mean that radical equality is possible (equality of outcome). However, T. Young pays attention to practical historic experience. In order to establish radical equality, the state coercion is needed which mostly ended in dictatorship. What is even more important is the following question: is there so much inequality because of domination of meritocratic principles or because of their absence (because the societies are not yet fully-fledged meritocracies)?

In reality, societies are specific mixes of these models, although one might prevail. Scandinavian societies – and partly Germany, Benelux, Austria and France (known for its tradition of prestigious schooling of high administrators) – are a combination of the meritocratic and (specific) egalitarian models in the framework of a very coordinated type of capitalism and a stable democracy. In Slovenia, for example, we can recognise the intertwining of the clientelist and egalitarian models with certain meritocratic traits and enclaves. The economic framework is provided by a combination of state and peripheral capitalism. The USA is a distinct mix of the meritocracy and plutarchic (plutocratic) models in the setting of neoliberal regulation (which is nowadays moving towards populism and state protectionism).

Today, we should mention a fifth possibility, which arises from the possibility of mediocracy, ‘the rule of the average or mediocrity’. Egalitarian and anti-elite tendencies in practice often end up in this form. On the other hand, this form of rule does not mean that educational achievements are not recognised. Quite the contrary. Due to credential inflation (as described by the British sociologist Collins 2011) and doubts concerning the level of knowledge in mass education systems, it often happens that meritocratic criteria are only applied formally – as a simulation of meritocracy. The average should not be treated negatively, but it is clearly negative if – in connection to the groups in power – it eliminates cognitively and creatively more propulsive individuals and replaces them with the average.

Most interesting is the new rising global power China. Yet, first we should also mention Singapore, whose government has for decades been promoting meritocracy in the sense of educational career as the key value and means for promotion (Tan 2008; Talib 2020). In the case of China (also due to the revival of the Confucian tradition), meritocracy is in the foreground (Bell 2016), but is combined with the egalitarian ideology of the ruling Communist Party with strong extensions of the plutarchic model (China is a very stratified society with a powerful class of hyper-rich people, who could not have achieved this position without the consent of influential people in the Communist Party). This country is also interesting because it challenges the central thesis of sociological (non-Marxist) theories of modernisation and theories of knowledge societies, namely, that a democratic or pluralist political framework is needed for innovation and intensive knowledge transfer³. Chinese (autocratic-led) development into the knowledge society shows this is not the case. This has yet to become the subject of systematic social science analysis and needs further research.

The main question posed by the authors in this introductory and review article is: what is the significance, scope and limitation of the meritocratic allocation of human resources in an (emerging) knowledge-based society (Stehr, 1994 and 2018; critically on this in Podmenik 2013) and how does it affect the notion of ‘merit’ and professional credibility (meritoriousness), social mobility as well as the understanding and evaluating of social (in)equality and the wider socio-political context?

3 Is meritocracy meritorious? Professional habitus and the type of knowledge

The idea of meritocracy, in an ideal-typical sense the ‘ruling’ of elites, or as the normative/regulatory model of social promotion regulation based on knowledge and expertise gained, is closely connected to education, especially higher education. This raises many

³ Here we can cite the statement by a naturalist (seismologist): "Science only works when researchers have the opportunity to defend conflicting views" (in Horton 2020: 114). The author of this book (from the field of biomedicine and the editor of one of the most prestigious journals in this field – Lancet) cites from Beck's (sociological) book *The Risk Society*, where the aspect of self-critic and reflexivity in science is emphasised.

questions regarding the quality of knowledge. However, it is especially important to distinguish the formal criteria for social promotion (such as a diploma) and other, substantive ‘merits’ and references that refer to creativity, the tendency towards professional/lifelong learning; synthetic (multidisciplinary) knowledge and the ability for (self) reflection (Guinier 2015; on different types of reflexivity, also see Golob et al. 2021).

In the context of mass education, some authors also note that diplomas alone do not reflect the actual knowledge and abilities of an individual. Moreover, the multiplicity of diplomas lowers their value in the market. Randal Collins wrote about the inflation of diplomas and certificates already in the 1970s, when he found that the increase in the number of people holding a diploma also leads to job offers that demand the higher education level even when not absolutely needed to perform the job. He has noticed a similar trend in more recent years and problematises the education system, which does not teach the competencies that are called for, but mostly provides cultural socialisation, class affiliation and normative control, while the necessary skills are mostly gained through workplace practice (Collins 2019).

Moreover, practical understanding of meritocracy largely depends on agreeing what constitutes merit, how do we measure it, and who determines what merit is (Šliwa and Johansson 2014). Here, some authors warn about the fluidity and flexibility of the term “merit” (Berger and Meroe 2014) and the related problem of measuring merit in terms of individual skills, qualifications and competencies. Besides diplomas, standardised tests are often used as a tool to measure the individual’s capabilities while excluding external influences (such as the influence of social status when applying for university). Still, considerable doubt exists as to the suitability of such methods and their independence from external factors (Au 2013).

In general, it continues to be true that people with a higher education earn more, yet changes in education and in the labour market have somewhat disturbed this connection. The costs of education have gone up, there are ever more graduates and hence greater competition in the labour market. Baum (2014) notes for the example of the USA that, in terms of personal income and labour market opportunities, it still pays off to possess a diploma and that its value increases with its level (Baum 2014). Cardoso (2004) reached similar conclusions⁴ regarding Portugal. In Slovenia, a group of economists recently conducted a study and made similar findings – the result of mass education on the tertiary level is leading to worse knowledge and lower quality graduates. This has caused personal income to level out, making it unsure that young graduates’ investment in their education will mean a higher salary or a more secure workplace (Vodopivec et al. 2020).

Meritocracy and expertocracy

Meritocracy stresses the individual’s knowledge, skills and merit, not only as concerns the individual and their social mobility, but also in a broader social context. Contemporary societies are too complex for governments to be able to make decisions without expert help and for citizens with limited knowledge to foresee and evaluate those decisions. This complexity of societies coupled with technological and economic advancement demand the division of labour (Nichols 2019), thus creating narrow specialisations. Meritocracy as an (ideal) model of social organisation based on knowledge and competencies should encourage

⁴ Fenesi and Sana (2015) further find that the value of a diploma depends on the discipline or programme. Authors compare different education programmes and their impact on the employability of graduates, especially in the field of the humanities in Canada. They find that graduates from the humanities have a worse position in the job market compared to graduates from different fields, they are more often re-qualified for the job they take and are more often employed at workplaces not connected to the field of their education.

the greater role of science and education in policy-making. This raises several questions: who are the experts, what kind of knowledge is preferred, how are the experts and scientists involved in government and institutional expertise and consulting roles selected; and what is their relationship with politics and the public?

There are many definitions of experts based on the type of their expertise and type of knowledge. The usual division is between experts and laymen. This relationship is not fixed, a person can be an expert in one field and a layman in another. We are dealing with the complex distribution of knowledge and a tendency towards various specialisations. The phenomenological philosopher and sociologist A. Schutz (1987) distinguishes three types and roles of knowledge. The expert possesses very specialised and sophisticated knowledge, but in very small field of study or work. The well-informed citizen as the second type possess broader and more synthetic knowledge, which enables a critical dialogue with an expert (e.g. in the sense of Citizen Science). The third type is the layman or ignorant 'person on the street' (today this would mean a passive consumer of unverified news from the social media and the Internet). However, even the layman has some sort of common-sense knowledge or thinking. In any event, there are multiple in-between and combined types of knowledge and expertise.

Nichols (2019: 30) states that experts are determined by a combination of education, talent, experience and peer affirmation. Therefore, an expert is someone who foremost holds the appropriate education (diploma, certificate, PhD). Experts are unlike people who only hold a diploma or certificate by possessing talent – a deeper feeling and understanding of a field. Thus, next to formal education, other things matter, such as experience (long-term and recent, since experts are involved in the area, improve and have a visible track record) and peer affirmation. This affirmation typically happens through institutions and mechanisms, such as peer review and expert associations and organisations that vouch for the individual's expertise and competence.

Tendencies for the greater inclusion of science and experts in the political and policy process are captured in the popular idea of evidence-based policy-making, which chiefly strives for greater rationality, systematicity and reliance on objective evidence in the public policy process. In practice, politics also relies on science through a complex network of advisory bodies and institutions where not only scientific, but also political, actions take place (Stevens 2020). In this regard, it is important who appoints experts and according to which criteria. Further, science is often understood as unambiguous, clear and infallible and is often expected to give accurate explanations and predictions (Nichols 2018). Yet science is a process and disagreements exist among different scientists, which can make the role of science in a society more difficult. This especially happens when politicians view science as simple and unambiguous (H. Collins 2014).

The relationship between experts, politics and public during the Covid-19 pandemic

The Covid-19 pandemic demanded a rapid and efficient political response in order to protect people's lives, namely public health. The specifics of the situation meant politicians were unable to make decisions without the input of scientists and experts. Especially experts from medical and epidemiological fields became central figures in the political, media and public discourse.

The relationship between the public and experts is based on trust, similar to trust in institutions. However, trust in experts has been falling in recent years, also due to the availability of information online and the understanding of equality as the equality of all

opinions. In some western societies, denying expert opinion has become a way of expressing one's autonomy (Nichols, 2018). Experts and scientists are often seen as part of the same elite as decision-makers (Nichols 2018) and in practice are regarded as part of an elite, which some authors (perhaps too ideologically) describe as threatening to democracy (Bovens and Wile 2017; Babones 2018).

Certainly, other aspects affect public trust in experts as well. Lack of information and knowledge about the virus, the disease and its consequences has often led to contradictory opinions of experts, not only on the national but also the global level (e.g. the WHO's changing recommendations regarding wearing masks in public). There were also big differences in the response of countries, which all referred to the opinion of experts (e.g. the Swedish strategy), which did not have harmonised concepts and recommendations. Therefore, another important question arises: who is considered to be an expert by the political authority? In the case of Slovenia, that saw a change in government when the epidemic initially emerged, the head of the National Institute for Public Health was also changed, entailing an epidemiologist being replaced by a public health specialist. However, this might also be attributed to differentiation within expert groups.

According to some authors (Lavazza and Farina 2020; Flinders and Dimova 2020; Stevens 2020), the strong reliance of politics on experts and professional bodies plays a dual role in the political process, especially in the current pandemic. On one hand, experts offer professional opinions and consultations while, on the other, this is a way of depoliticisation and a strategy of shifting the blame onto others. Politicians use experts to justify unpopular measures and transfer their public responsibility to experts. This can prove problematic for several reasons.

In this way, experts who may not understand the entire political process and have not mastered the dynamics of politics find themselves at the core of it (Flinders and Dimova 2020). This may mean that expert recommendations and prepositions go beyond simply trying to find the best technical solution to the problem and begin to interfere in the sphere of broader social values which must be decided within the policy process.

4 Social mobility – between unjust (radical) equality and just inequality

A large part of the discussions regarding meritocracy and its effects on society focus on social mobility. In perfect or ideal-typical meritocratic societies, each individual should have an equal opportunity to advance up the social ladder, based on their effort, knowledge and competencies. According to Goldthorpe (2003) who relies on (albeit older) data on social mobility, one cannot conclude that 'effort and talent' neutralise the original class position of an individual. In practice, there is still a considerable connection between one's original class position and one's level of education, while for uneducated individuals of a higher class a descent down the social ladder practically does not occur (Goldthorpe 2003).

On the contrary, Saunders (2002) notes that British society is meritocratic and permits the positive social mobility of individuals from lower social classes or those from less privileged environments if they obtain a higher education (Breen and Goldthorpe 2002). Later, Goldthorpe and his group of researchers (in Bukodi et al. 2019) showed that in the last few years the influence of the family's economic resources on the individual's education level has been reduced. However, the influence of the parent's socio-cultural and educational resources on children's education level has grown (Bukodi et al. 2019).

In the context of Slovenia, one can only find modest research on social mobility. One study (in fact, only based on primary data) was published in 2008 by Jereb and Ferjan. Proceeding from own data and an international comparison with similar studies, they found that the level of social mobility in Slovenia was higher than in Germany, Italy, Poland and Hungary because over half the people had advanced on the social ladder compared to their class of origin. Most of this mobility is observed from the lowest, occupational classes to the middle class. Education plays a big role here since the individual's education statistically significantly influences the individual's class. The mentioned research relied on data from 2006, yet considerable social mobility in Slovenia is also noted by some newer studies. Still, there is the question of how reliable and methodologically correct they are. Authors of the first study, which followed the example of Goldthorpe's scale of seven grades, established optimistic results regarding social mobility in Slovenia. Yet, they also note that since the country's independence it is mainly the class of bureaucratic officials that has grown.⁵

OECD research from 2018 finds that there is less social mobility among classes for the cohort born in 1960–1947 compared to that born in 1945–1959 in Slovenia, but compared to other countries social mobility is still relatively high (OECD 2018: 223-225). Educational mobility in Slovenia is lower than in some other countries, yet authors explain this with the important role of qualifications provided by secondary education in the local labour market (OECD 2020: 247)⁶.

The considerable impact of non-meritocratic factors on the individual's performance and social mobility has led, especially in the American context, to several works and publications that treat meritocracy merely as a myth, as not existing in reality (Littler 2017; McNamee 2018; Markovits 2019; Sandel 2020). Such authors often claim that social mobility in the USA practically does not exist (Markovits 2018), individuals do not have equal opportunities for success and advancement up the social ladder and factors other than talent, capability and effort have a greater impact on social mobility (like class of origin, social and cultural capital, luck, unequal starting opportunities, discrimination) (McNamee 2018). These claims might be highly exaggerated or even wrong – the mentioned OECD study shows the opposite – that USA is among the most socially mobile societies in the world.

Further, these authors argue that trust in the meritocracy concept could even be detrimental to society because the assumption that the system is fair and functioning blames individuals for their failure and poverty (McNamee 2018). Further, belief in meritocracy establishes competition between individuals (Littler 2018) and justifies and increases inequalities in society (Markovits 2019; Mijs and Savage 2020).

These are generally authors who, in essence, not only strive for equality of starting points and fair inequality, but also to eliminate all inequalities in society (equality of outcome) or even (e.g. Sandel 2020) criticise the doctrine of market regulation. Some of these authors openly

⁵ They say: "We are concerned about the high percentage of individuals in classes IIIa + IIIb in Slovenia" (Jereb and Ferjan 2008, 205). This means that a large part of mobility or advancement in social classes is a consequence of the "enormous bureaucratic system".

⁶ It should be mentioned here that these claims are not argued or that arguments for this claim cannot be understood from the mentioned report. There is also considerable ambiguity in methodological terms. The authors of this report use a classification with 10 classes (as mentioned, Goldthorpe's classification includes 7), which are actually status groups based on the combination of occupation, job and income (the 'ESEC' classes). There is no real dividing line between them and they overlap. The end result does not give the impression of credibility. We may conclude (taking the WEF report into account), that these data are unreliable, time-inconsistent and difficult to use for time or international comparisons. According to the latest report of the World Economic Forum, Slovenia is quite high, in 13th place (WEF 2020), regarding social mobility, yet this report measures absolute social mobility in terms of several criteria but only based on selected secondary data.

acknowledge they are advocating ‘left sociology’ ideas (Littler 2018: 221) and for development away from the knowledge society (Markovits 2019). Moreover, while talking about meritocracy these authors often understand (or replace) the term as meaning the situation in American society today, which is actually closer to plutarchy than meritocracy (especially in higher education, the (un)equal opportunities and privilege of wealthy elites within it (Guinier 2015, Markovits 2019, Carnevale et al. 2020).

Criticism of meritocracy can also be found in the Slovenian setting. Tašner and others (2016) acknowledge some positive features of meritocracy with regard to the self-realisation of individuals, but they are generally sceptical about whether the popularisation of education is really reducing differences among young people, but increasing them. Their claims are not based on empirical evidence, yet they argue that “as long as an individual’s success in life is influenced by family and social background, social goods are not distributed solely on the basis of merit”.

The goal of meritocracy is not ultimate equality among people, but just inequality. Pinker (2019) explains that if inequalities are a result of meritocratic criteria, people are not bothered by them and perceive them as fair. Connected to this, we can mention the known book (and surrounding debate) by the French economist Thomas Piketty about the rise of inequality. In this book, Piketty emphasises that meritocracy is fairer than other social concepts because it relativises the importance of inherited privileges, monopolies and wealth. In a sense, he advocates a combination of meritocracy and egalitarianism (Piketty 2015)⁷.

We may conclude that the idea of meritocracy cannot thrive in either an environment of great inequality (unjust inequality) or an environment of egalitarianism (unjust equality). As Pinker (2019) and before him Bell (1972) state, the actual use of meritocratic criteria implies fair inequality and the provision of at least approximately equal starting possibilities in an otherwise stratified or differentiated society.

5 Between egalitarianism/populism and meritocracy – the case of Slovenia

The theoretical framework and starting points show that we are dealing with a multifaceted, ambivalent and controversial topic. Looking at the role of meritocratic criteria and values, supporting these criteria through the prism of empirical data, we immediately encounter the problem of how to interpret them. First, we proceed from data and indicators relating to the educational structure (share of the population with a tertiary level of education, including doctorates, investments in research and development, and the formal education level of key functionaries in society) for the example of Slovenia. We notice that in many respects the data indicate that meritocratic principles are being considered and realised.

This is shown by the occupation of leading positions, where at least at first glance it seems that people with (mostly) a higher education are selected for these positions. When we consider that investments in education and partly also science (government investments have

⁷ Daniel Bell, already in his book *The Coming of the Post-Industrial Society* (1973), and especially in the article in *Public Interest* (Bell 1972), distinguishes two types of equality. The first is equality of result, meaning that there should be no significant differences between individuals in status and income, even if some are much more talented or achieve higher levels of education. The second is equality in terms of starting opportunities, which should be approximately equalised so that all interested parties can participate in the competition for education, career and mobility – no matter the individual's starting position (in terms of class and social origin), if they are willing to learn and show talent. Meritocracy is committed to the second of these and in this sense carries both – elements of elitism and the idea of justice in society.

fallen, but are currently rising), we may conclude that these are significant investments in a meritocratic ‘infrastructure’⁸.

Opinion data and values reveal the situation as ambivalent. On one hand (data from World Values Survey 2010–2014 and European Values Survey 2017), the Slovenian population strongly prefers egalitarianism (equalisation, levelling) in income and wealth. Here, it is more egalitarian than the Swedish or Dutch populations. On the other hand, it advocates competition in society and sees competition and stimulation for hard work as a source of new ideas. To some extent, the bigger extent of egalitarianism can be explained by ideological preferences. However, we cannot speak of any consistency, but of cognitive dissonance⁹.

A similar picture is shown by an ethnographic study (Trdina, 2017). The study demonstrates that in micro-situations the legacy of radical egalitarianism co-exists with the discourse on meritocratic values. There is a certain ambivalence and frustration regarding the post-socialist distribution of resources. In the context of post-socialist transformation, the practice of distinction is based on constant negotiations between market individualism and meritocratic principles on one side, and radical egalitarianism, redistributive ethics and anti-entrepreneurial logic on the other. This negotiation forms a framework through which individuals articulate their ideas on relationships between the moral and material in everyday interactions (Trdina 2017, 2015).

Luthar (2014) similarly notes there is a contradiction between statistical data on income inequality and the perception of inequality and the ideal social structure in Slovenian society. Although Slovenia is one of the most egalitarian societies (according to the Gini coefficient and a self-assessment survey of the hierarchical ladder, where the majority counts themselves as middle class, Luthar 2014), individuals see differences in societies as too big and in need of reduction. The author interprets this as an echo of the political and media discourse on social differences, introducing the term “contradictory populism” (Luthar 2014). Still, we can say that the results are a consequence of an unexplored area of stratification, which should not only take into account income inequalities (Gini coefficient), but differences in property or resources that are unevenly distributed and contribute to social differences (Adam 2020).

Based on the above-mentioned data, the Slovenian population is in favour of putting importance on new ideas and creativity (typically a meritocratic value). Further, the data about support for different forms of government are extremely interesting and intriguing. Slovenians (like others) declare they support democracy but, when faced with an alternative of an expert government (instead of an elected government), the vast majority opts for that (for more, see Adam and Tomšič 2019). Does this mean that support exists meritocracy outside of the democratic framework? It should be noted though that the majority of the European population supports the idea of an expert (technical) government, which can be explained more by dissatisfaction with democracy and fatigue with politics than by the fact

⁸ A bigger problem than the lack of funds for research is how to distribute those funds. Is the evaluation process appropriate? Do those with ideas receive funding for projects? In other words, even in science, meritocratic criteria do not necessarily apply in the process of dividing funds for a limited number of projects. It is known that the European Commission (in the publication Slovenia – Country Report, 2019) commented that public funds for science are not sufficiently allocated to the most successful scientists in Slovenia. This basically means that other criteria are considered (institutional, ideological, belonging to a certain network...). Many young people with a higher education, especially a doctorate, go abroad. This testifies that the formal meritocratic criteria are not enough and only the statistical data on the number of diplomas and doctorates does not enable the conclusion on the existence of a meritocratic society.

⁹ Data from the European Social Survey from 2018 show that in Slovenia about 72% of people agree that a society is fair when wealth is evenly distributed. At the same time, 87% of Slovenians agree that society is fair when working people earn more than others. We are well above the EU average in both indicators.

that citizens genuinely have an idea of what such a government would mean. On the other hand, perhaps the same citizens (voters) are opting for populist leaders, as opposed to advocating for an expert government.

6 Discussion

This article offers a review and critical evaluation of recent literature in the field of meritocracy and its impact on inequality and political culture or the understanding of democracy. In this regard, authors hold quite ambivalent opinions. Some believe that meritocracy does not reduce social inequality based on the individual's class position but actually reproduces this inequality. Although some authors oppose the concept, no other appropriate alternatives can be found in the literature. One author discusses this by saying: "*meritocracy is a myth, but in a positive sense*" (Muller 2017).

Thus, authors are often left halfway through, leaving many new questions open. One of the big ones is certainly the problem of defining meritocratic criteria ('merit') and measuring merit. In practice, diplomas and various tests are typically used, but they are often one-sided and only show that aspect related to formal certificates and neglect many others. It is clear that the knowledge society is very compatible with the concept of meritocracy. Yet the question remains of whether only visible aspects (related to certificates and diplomas) are taken into account or whether other less visible factors are included as well, such as the ability for self-reflection, synthetic thinking, creativity and the existence of professional autonomy and integrity.

This raises not only the issue of the individual's position on the social ladder, but also the broader social context: which skills are preferred in society? More and more knowledge (especially in the area of technological development) is being created outside of the education system, which is supposed to play a central role in awarding the certificates of competence and merit. The production and growing importance of knowledge itself does not necessarily also mean this knowledge is put to socially responsible use. In this respect, the relations between different social spheres are important – how they understand meritocracy (which competencies and knowledge they prefer) and whether they mostly promote knowledge that benefits wider society or only narrow interests.

Meritocracy encourages investment in the individual's competencies and productivity, while it also increases the importance of knowledge and science in society. At the same time, some authors (Bovens and Wille 2017; Babones 2018; Mijs and Savage, 2020) are concerned that meritocracy leads to elitism, which can bring negative consequences for a society. However, this 'elitism' cannot be avoided, all we can do is prevent it from becoming 'arrogant' and self-proclaimed elitism, and ensure a social discourse based on pluralism and personal and professional responsibility is involved.

There is the impression that authors are aware that meritocracy, as a normative-regulatory principle of social organisation, has no real alternative or that the other alternatives are even worse. Even a utopian (socialist) society of equality should, in some ways, take account of the individual's 'merit' and recognise that competition is an inherent anthropological constant. Authors are aware that some inequalities in a society are inherent, and that the tensions and contradictions between justice and inequality, and between freedom and efficiency, can positively impact the quality of life. They realise that the individual has never before had such opportunities as provided under the concept of meritocracy (Tašner et al. 2016). Still, it is clear that competition can degenerate into destruction if it excludes cooperation and solidarity (Gambetta 2000).

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Appendix

Table 1: Table based on the analysed literature

Evaluation/impact	Positive	Neutral	Negative¹	Ambivalent	Alternative²
Aspect					
Professional habitus and type of knowledge	Baum, 2014 Cardoso, 2004 Nichols, 2019 ³		Au 2013, 2016 ⁴ Guinier, 2015	Gaber and Marjanovič Umek, 2013 ⁵	Guinier, 2015
Social mobility and (in)equality	Jereb, Ferjan 2008 Saunders, 2002	Goldthorpe, 2003, 2019 (in Bukodi et al. 2019) ⁶	Lipsey, 2014 Littler, 2017 Markovits, 2019 McNamee, 2018 Mijs, 2019; Mijs and Savage 2020 Sandel, 2020	Tašner et al., 2016	Littler, 2017 Markovits, 2019 McNamee, 2018
Values of a just society	Meroe, 2014 ⁷ Piketty, 2015 Pinker, 2019 T. Young, 2020	Martin et al. 2014 So, 2015 ⁸	Lipsey, 2014 McNamee, 2018 Mijs and Savage, 2020 Sandel, 2020	Kodelja, 2015 ⁹ Gaber and Marjanovič Umek, 2013	
Impact on social and political processes	Nichols, 2019 Mueller, 2017	Meroe, 2014	Babones, 2018 Bovens and Wille, 2017 Littler, 2017 Lind, 2020	Guinier, 2015	Bovens and Wille, 2017

¹ In this category, most authors expressly refer to the American (Au 2013, 2016; Guinier 2015; Markovits 2019; McNamee 2018; Sandel 2020; Babones 2018) or British context (Lipsey 2014; Littler 2017). Only a few authors focus on the European context (Bovens and Wille 2017; Mijs 2019; Mijs and Savage 2020 and partly Babones 2018 and Lind 2020).

² Alternatives are mainly presented by authors who advocate greater equality, not only in the sense of equality of opportunity, but mostly of equality of outcome. These, too, are mostly focused on the American context. Such alternatives envision tax reforms (McNamee 2018, Littler 2017), quotas, worker co-ownership of companies, promotion of cooperatives and community centres (Littler 2017), more civic education and decentralisation of the political process (Bovens and Wille 2017), and reforms of higher education and ways of measuring competencies and merits (Guinier 2015).

³ The author does not discuss the concept of meritocracy, but the position of scientists and experts in society. In this context, he emphasises the importance of science and scientists in society and argues that the opinions of experts on professional matters are not equivalent to the opinion of lay people and advocates for a greater role of science in society (Nichols 2019).

⁴ The author refers only to the situation in the USA and the determination of competencies and merits using standardised tests. He argues that the meritocratic ideology in the USA has helped mask systematic racism and contributes to the blaming of individuals and minorities for their inferior position (Au 2013, 2016).

⁵ Meritocracy encourages inclusion in education, yet it also masks the reproduction of inequality through the cultural bias of schools. However, the authors acknowledge that some inequalities are inherent in society and can be the driver of well-being (Gaber and Marjanovič Umek 2013).

⁶ Their analysis in 2003 found there was still a strong correlation between one's original social class and level of education. But a later study from 2019 notes that the impact of family economic resources on children's education levels has decreased (Bukodi et al. 2019).

⁷ The author believes that meritocracy ideally strives for a more just society. However, not all of its principles are democratic and the concept needs to be considered critically (Meroe 2014).

⁸ The mentioned authors (Martin et al. 2014; So 2015) point out that justice (or the ethical acceptability) of meritocracy depends on providing equal opportunities to everyone, regardless of class, gender, ethnic and religious affiliation and economic class. These works mostly refer to specific contexts of Australia (Martin et al. 2014) or Taiwan (Since 2015).

⁹ Meritocracy has major shortcomings, mainly associated with establishing competition and the connection with neoliberalism, which subordinates schools to the economy and puts human capital at the forefront. However, the author believes this system is the most equitable in the current situation (Kodelja 2015).