

MERITOCRACY – MYTH OR REALITY?

Introduction

The concept of meritocracy refers to three basic normative ideas:

- 1) Every member of society should have the opportunity to develop their talents and achieve the optimal education level.
- 2) The individual's social status and social promotion/mobility should depend on the vocational, intellectual and creative contribution they make to socio-economic and cultural/scientific development on the local/organisational, national and international levels.
- 3) Society should allow talented people to rise to the fore in order to promote sustainable development as well as technological and social innovations; people with high levels of competence and expertise and reputation should be recruited for leading positions (elite).

Yet, in practice we encounter considerable obstacles that hinder the use of pro-meritocratic principles. Above all, the phenomenon of the simulated (fake) meritocratic management of human resources may be mentioned. This is often related to mediocracy (the rule of the average). Generally speaking, meritocracy cannot function in a very unequal society, leading to exclusion and disintegration. However, even egalitarianism limits the application of meritocratic principles.

1. Meritocracy on a macro level seldom appears in its pure form; modern societies are more the outcome of cohabitation and tension between different values and regulations

In (older) literature, the distinction between two types of equality, equality of outcome and equality of opportunity, is considered. Meritocracy is committed to the latter and, in this sense, contains elements of both elitism and egalitarianism. This concept is, therefore, inherently controversial and may be understood in different ways. Authors who see equality as equality of outcome consider it in terms of elitism, which causes or legitimates unfair inequality. Alternatively, the concept may be viewed in the sense of fair inequality since it opens up possibilities for social mobility and promotion to people from lower social strata. A combination of talent and effort (which Young who in 1958 introduced the term, understood as constituting the basis of meritocracy) can enable them to compensate for their worse starting opportunities as determined by their family/class background.

One aspect of meritocracy is value orientation or the belief that social mobility and promotion should be based on the criteria of individual achievements and investments in education and talent. Yet it could also be said that meritocracy is a kind of policy and technology underpinning optimal human resource and human capital management. This also forms the basis of the knowledge-based society/economy concepts. It is necessary to mention that modern societies are not only based on

production and the utilisation of knowledge or cognitive mobilisation (Adam, 2014). The short-term, profit-driven market allocation of resources, financial capital, loyalty, and the existence of 'special interest' or rent-seeking groups are often stronger than meritocratic principles. Entailing both the reproduction of its power and internal hierarchies, the retention elite operates based on inherited advantages and (controlled) social networks, which they use as a counterbalance to human capital.

In other words we are dealing with several types of capital, not simply human. We can also list (by slightly reinterpreting P. Bourdieu) social capital (emphasising individuals' involvement in networks that provide important resources and information), economic capital (wealth and access to financial sources) and cultural/moral capital (a charismatic influence on others with different ideas of social transformation and justice). There is competition among these types of capital, but also a trade-off.

Proceeding from these starting points, we can define four ideal-type (M. Weber) models of societal formations: 1) meritocratic society (since meritocratic principles and values are systematically applied and human capital is ranked first, in a core sense, this coincides with the knowledge society); 2) clientelist society based on the belief and practice that informal relations and loyalty to the powerful person in network or institution (or "patron") do matter; one component of social capital is at the forefront here – so-called bonding capital); 3) plutarchic (plutocratic) society meaning the rule of the super-rich or economic and financial oligarchies with hereditary reproduction and 4) egalitarian society based on moral-cultural capital and the idea of justice; in reality, we encounter both more moderate and radical egalitarianism¹.

In addition, the type of institutional system labelled as mediocracy or the rule of the average should be mentioned. Still, this is not a planned and intentional system. It may be a side-effect of an anti-elite orientation of an egalitarian or populist regime, or may even be connected with a simulated meritocracy meaning mechanistic or politicised use of certain meritocratic criteria which might exclude more creative candidates (objectively more competent) for social promotion.

Today's societies are specific mixes and (re)combinations of these models. Scandinavian societies are a blend of the meritocratic and (specific) egalitarian models within a coordinated type of capitalism and stable democracy. In contrast, Mediterranean societies see the big influence of clientelism within peripheral capitalism and an unstable democracy. In Slovenia, for example (and similarly in Eastern Europe), we can detect a mix of clientelist and egalitarian models with certain meritocratic enclaves. The United States is marked by the intertwining of meritocracy and a plutarchic (plutocratic) model within a neoliberal regulatory framework which in recent times is being withdrawn by populism and state intervention in global trade).

¹ These models are linked with certain types of capitalism (market regulation). Meritocratic society is mainly but not exclusively connected with the coordinated type of capitalism, clientelist society partly with state-led capitalism and partly with crony capitalism. Plutarchic society is closer to (neo)liberal capitalism, while the egalitarian model presupposes etatism (capitalist or socialist).

2. Meritocracy is not necessarily connected with (pluralist) democracy

Singapore is considered a fully-fledged meritocratic system as shown in its civil servants and its political leadership whose upper members are mainly selected from among those performing best in the highly competitive education system.

An interesting example is the rise of China as a powerful global player. Meritocracy (also due to revival of the Confucian tradition) appears at the forefront, but is combined with the egalitarian ideology (of the Communist Party) and even strong elements of the plutarchic model. Namely, Chinese society is one of the most unequal societies in the world (as measured by the Gini index). However, in Singapore's case, we can speak about a semi-democratic regime based on rule of law with a strong leader while, in the case of China, a one-party and personalised authoritarian system prevails. It is interesting that Daniel A. Bell (2015; 2018) describes political meritocracy in this huge state system, arguing that China has some sort of local democracy in place, not on a "populist" basis like in the West, but one based on competence (see Bell in Kursbuch, no. 194).

China is primarily interesting because it challenges the central thesis of sociological (non-Marxist) theories of modernisation, including system (differentiation) theory and knowledge society theories – the notion (even axiom) that a democratic or pluralistic political framework is needed for innovation and the intense transfer of knowledge. Chinese development in the knowledge society disproves this.

Another point is of interest to Europe. When people (respondents) are asked in cross-national surveys (like WVS-EVS, ESS) about their evaluation of democratic order, they declaratively support (parliamentary) democracy. However, if confronted with alternatives to democracy (like the authoritarian rule of a strong leader, military rule, or an expert government), they largely choose the notion of an expert or technical (non-elected) government (in Eastern Europe over 80% of samples and in other (Western) countries over 50%). Does this mean support for meritocratic rule outside of democracy?

3. More demanding criteria for the meritocratic allocation of human resources should be applied

Meritocratic principles and criteria can be used in different ways. This creates tension between simulated/actual (real) use and between formal/content use, between manifest and latent functions. We are interested in more demanding forms of meritocratic criteria. In other words, it is not only about taking account of diplomas, doctorates and other titles, but also lifelong learning, the ability to participate in teamwork, and reflexive ability. The following facts and questions are vital:

- Considering the dramatic expansion of higher education in EU member states (and beyond), the question is: What is the quality of the knowledge imparted in mass education? Amongst young people (aged 26-34), we now find in many countries that 45%-50% have completed tertiary education and in some others more than 50% (see European Innovation Scoreboard, 2018). The exception (compared with other more developed countries) is Germany with just

31%. Less than 30% of young people hold a tertiary education in Hungary, Italy and Romania).

- Is meritocracy simply a matter of considering formal education and formal certificates of competencies, or does it chiefly emphasise professional autonomy and professional ethics?
- Is meritocratic allocation focused exclusively on instrumental (specialised) knowledge (expert knowledge) or does it also include a tendency towards social dialogue and reflexivity (Archer, 2017)?
- To what extent are bureaucratic (politico-ideological) and business interests, which are short-term and clientele-oriented, generating a 'simulated meritocracy'?

Stated more positively, the meritocratic doctrine in the knowledge-based society should take into account and reward professional autonomy and ethical responsibility. Regarding the type of knowledge, the ability for synthetic and complex thinking as well for reflexivity are today needed more than one-sided expertocracy and formal certificates. In this sense, the distinction between instrumental and reflexive knowledge (Burowoy) can be used. Although both types may complement each other, the later is representing a higher level of knowledge production and dissemination.

Conclusion

Myth can have a positive and a negative mobilising role. If it facilitates the social discourse on society's intellectual potential, then it has a positive role.

“Die Meritokratie in alter und neuer Gestalt mag ein Mythos sein, aber was waeren wir ohne diesen Mythos?” (Citation from the text *Von Meritokratie zur Expertokratie?* by Hans-Peter Mueller, 2017).

Also the discussion on the limits of the social (in)equality is important in this regard. I quote again the same author. He says: “ Die Meritokratie ist ein alles andere als perfektes Ideal, aber wohl unverzichtbar, um eine Balance zwischen dem Recht auf Gleichheit und der Erfahrung mit sozialen Ungleichheit herzustellen”.

And last but not the least: what is my own (novel) contribution to the study of meritocracy? What I presented here is only a sketch (outline) for further study and empirical research. There are some accents which shed probably new light on this topic. First of all, I would underline the notion of meritocracy as an ideal-type in the framework of other models of society/social fields (clientelistic, plutarchic, egalitarian and may be mediocratic models). Secondly, I think that the (hypo)thesis on simulated meritocracy might prove to be useful. Also the distinctions between instrumental and reflexive knowledge should be developed further and in connection with the sociology of science and sociology of knowledge (in the framework of so called the Mode 2 and 3 Production of knowledge as well as in framework of my elaboration of the notion of cognitive mobilisation).

Thank you for your attention.