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Meritocracy

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Abstract

A meritocracy is a society in which positions of advantage and power are distributed based on people's merit. Although the word meritocracy was only coined during the 1950s by Michael Dunlop Young, merit as a principle for organizing society is much older. The relationship between merit, equality of opportunity, and desert is explored. Several recent critiques of meritocracy are discussed, including that meritocratic thinking is responsible for the rise of populism around the globe.

Keywords: discrimination; education; equality of opportunity; inequality; merit; meritocracy; power; Michael Dunlop Young

A meritocracy is a society in which positions of advantage and power are distributed based on people's merit. This entry discusses the origins of the term meritocracy, the concept of merit, and the connection between merit and equality of opportunity. It ends by exploring justifications for and objections to meritocracies.

Origins

The term meritocracy is commonly believed to have been coined by sociologist Michael Dunlop Young (1915–2002) in *The Rise of the Meritocracy* (1958). Various others, however, used the term around the same time, including Hannah Arendt (1961) in a critique of the UK education system (*see* ARENDT, HANNAH) and Alan Fox (1956) in a socialist critique of inequality.

Early uses of the term meritocracy are overwhelmingly critical (*see* Littler 2018: Ch. 1). In Young's novel, the narrator sets themselves the task of identifying the causes of an impending populist uprising. They believe it may turn out like the French revolution of 1789 in scale (1958: 11). This time, the root historical cause is not birth privilege (an "aristocracy of birth") but social stratification based on talent (an "aristocracy of talent").

To Young's own surprise, meritocracy later came to denote a political and social ideal, defended by academics as well as politicians. In an essay published shortly before his death, Young (2001) urged politicians to stop using the term, warning that his native Britain was steadily turning into the "polarized meritocratic society" that he had warned against over 40 years earlier.

Although the term meritocracy was not coined until the 1950s, merit as a principle that governs the distribution of positions in government is many centuries older.

It developed in Western and Eastern philosophical thought and was used to criticize hereditary systems of government.

The Greek philosopher Plato (428–348 BCE; *see* PLATO), for instance, advocated a society ruled by the most meritorious: philosopher-kings (1991: R 473d–e). His pupil Aristotle (384–322 BCE; *see* ARISTOTLE) claimed that “everyone agrees that justice in distribution must be in accordance with some kind of merit” (2014: NE V.1131a25). At the other side of the globe, the philosopher Mozi (470–391 BCE; *see* MOZI) wrote that “there is order when the noble and the wise govern the foolish and the base” and that “esteeming the worthy is the foundation of government” (2010: 9.1, 73). His philosophical opponent, the Confucian Mencius (372–289 BCE), argued similarly that society should be ruled by men who use their mind as opposed to their muscles (2008: 3A4.6).

Since these classical defenses of the meritocratic ideal, several philosophers have invoked merit to advocate for social change – and the notion was gradually broadened to apply to the distribution of jobs more generally, as well as educational opportunities. One well-known example is *The Subjection of Women*, an essay by John Stuart Mill (1806–73; *see* MILL, JOHN STUART), in which he argued that “conduct, and conduct alone, entitles to respect: that not what men are, but what they do, constitutes their claim to deference; that, above all, merit, and not birth, is the only rightful claim to power and authority” (1869: 152). Mill not only advocates for universal suffrage but also for women’s equal access to educational opportunities and jobs.

In recent years, several books have been published about the history of merit and meritocracy in China (Bell 2015; Khanna and Szonyi 2022), the United States (Kett 2013), and around the globe (Wooldridge 2021).

Central Characteristics

The economist and philosopher Amartya Sen once quipped that “[t]he idea of meritocracy may have many virtues, but clarity is not one of them” (2000: 5). It is, hence, crucial to define meritocracy.

Definitions of meritocracy typically start by defining the term merit and then claiming that a meritocracy is a society in which the distribution of governmental positions, jobs (and the incomes attached to them), and/or educational opportunities is proportional to people’s merit (Daniels 1978). Some philosophers defend meritocracy as a full ideal of justice (*see* JUSTICE), covering all that justice requires (Mulligan 2018), others as a partial one, describing only part of what justice requires, alongside need, equality, and/or other values (cf. Miller 2001).

Defining merit

Merit, at the most general level, is a praiseworthy or virtuous characteristic of a person. It is indispensable that the meritorious are not simply talented (or,

more precisely, in possession of praiseworthy characteristics) but also act on their talent. The importance of action in merit is already present in Michael Young's dystopian novel, in which the narrator claims that "[i]ntelligence and effort together make up merit ($I + E = M$)" and that "[t]he lazy genius is not one" (Young 1958: 94).

Meritocrats agree that which praiseworthy and virtuous characteristics exactly constitute merit is, in part, contextual (Feinberg 1963; Kleinig 1971; Miller 2001: Ch. 9). The relevant context is determined by the object that is to be distributed. If it is an educational opportunity such as a place on a philosophy PhD program, then the relevant praiseworthy characteristics include aptitude for doing academic research. If it is being a union leader, then the relevant praiseworthy characteristics include the ability to organize.

Institutional, pre-institutional, and pre-justicial notions of merit

It is helpful to distinguish between institutional, pre-institutional, and pre-justicial uses of the term merit (Olsaretti 2003: 9–11; Scheffler 2000: 979–81). On an institutional interpretation, people's merit is reducible to their legitimate institutional expectations. For instance, the CEO of a bank may merit a bonus if she fulfills the criteria specified in her employment contract, even if it turned out that she overleveraged the bank – the only thing that matters is whether she fulfilled the conditions in her contract. On a pre-institutional interpretation, people's merit comes down to the demands of some other principle, such as efficiency or utility. Here, an example would be the claim that jobs should be allocated such that economic growth is maximized.

On a pre-justicial notion of merit, people should be rewarded for exercising their praiseworthy and/or virtuous characteristics (Miller 2001: Ch. 9; Mulligan 2018: Ch. 5). A meritocratic principle of hiring could, for instance, require that a transgender applicant get the job because she is the most qualified for the position, even though the company advertising the job would lose customers because some customers prefer not to interact with transgender people. The fact that the applicant is transgender is, after all, irrelevant to her capacity to carry out the job well.

Equality of opportunity

Defenders of meritocracy insist that there is a strong connection between equality of opportunity and merit (Daniels 1978; Mulligan 2018: secs. 4.4–4.5). In particular, they believe that it is permissible for people to become better off based on *natural* luck factors, such as their native intelligence, but *not* based on *social* luck factors, such as being born into a wealthy, well-connected family. That is why, according to them, meritocracy requires fair equality of opportunity (*see* EQUALITY OF OPPORTUNITY). As Daniels explains, it is not enough just to eliminate “legal and quasilegal” barriers to obtaining positions of advantage and power, also “positive steps must be taken to provide equality of access—and the means to achieve such equality of access—to those with inferior initial

competitive positions resulting from family background or other biological or social accidents” (1978: 217).

Most meritocrats believe that fair equality of opportunity should be realized through significant government intervention in the lives of children but not adults. Guaranteeing fair equality of opportunity is typically taken to, at least, require that children and young adults can access high-quality education and healthcare either free at the point of use or otherwise at very low costs (*see* AFFIRMATIVE ACTION). No such requirement is present for older adults. Meritocracy, then, is a starting-gate view. There is debate among defenders of meritocracy about what fair equality of opportunity requires exactly and whether it is possible for the state to realize it in the first place (Arneson 1999; Brighouse and Swift 2009; Harel Ben Shahar 2023; Mulligan 2018: secs. 4.3–4.5; Napoletano 2024).

Proportionality

Aristotle argued that “the just is a sort of proportion” between how meritorious people are and what they receive (2014: NE V.1131a30). Contemporary meritocrats agree: merit requires proportionality between a person’s level of merit and what they are receiving. If there is no such proportionality, then the resulting distribution is unfair (Daniels 1978: 207). The proportionality requirement may appear trivial, but it has important consequences. Those who support it can straightforwardly argue that it is unfair when two equally meritorious persons get paid different amounts because of racial or sexual discrimination (i.e., meritocrats support “equal pay for equal work”). Moreover, they typically hold that there is disvalue not only in people getting less than their level of merit would require but also in them getting more than this. It is a matter of debate whether the notion of merit itself can indeed settle what a just pay schedule is (Andersson and Sandberg 2019: 179–81; Olsaretti 2009: 184–5). To come to precise judgments about who should be paid what amount, merit may need to be supplemented with other principles and institutional considerations.

The notions of merit and desert (*see* DESERT) are closely related to each other. Some philosophers believe that a distinction between the two is “*ad hoc*, since ordinary language doesn’t support a sharp merit-desert distinction” (McLeod 2008). Other philosophers have offered accounts of the distinction between merit and desert, which typically insist that merit only requires fair equality of opportunity, whereas desert comes with a more demanding responsibility requirement (Miller 2001: 125; Pojman 2006: 22).

Defenses and Objections

An important argument in favor of meritocracy is that a meritocratic system is socially productive. If the most meritorious are awarded positions of advantage and power, then society will benefit: rulers and business people will be competent, and educational opportunities will go to those who can make the most of them

(Daniels 1978). Such a system is not only to the benefit of society, meritocrats stress, but also to the benefit of the individuals who make up the society, because it will allow them to cultivate their talents. In a meritocracy, after all, it is impermissible to bar individuals from positions of advantage and power because of irrelevant characteristics, such as ancestry, gender, gender identity, race, sex, and sexual orientation (Mulligan 2018: sec. 5.9; *see also* GLASS CEILING; RACISM). And the notion of merit has served, for many centuries, as the fuel for social movements that try to tear down discrimination (Wooldridge 2021; *see also* DISCRIMINATION).

In recent years, a host of critiques of meritocracy have emerged. First, philosophers have argued that meritocracy is fundamentally unfair because it allows people to become better off than others based on factors they do not have control over – such as their native talents. This moral arbitrariness critique of meritocracy was raised powerfully by John Rawls (1999: secs. 17, 48; Lister 2022; *see* RAWLS, JOHN) and is commonly believed to have led to meritocracy losing in popularity as a theory of distributive justice (Moriarty 2003; Mulligan 2018: sec. 7.1). Also, and in a similar vein to Young’s dystopian analysis, critics have argued that a meritocratic society would be rife with humiliation: those who are badly off deserve to be so, because they lack talent and/or the ability to put their talents into action (Miller 2001: 199–202; Sandel 2020: 25–7). This way of thinking harms social cohesion and may even explain the rise of populist movements around the globe (Sandel 2020: 30–1). Third, some have argued against meritocracy because it could be used to defend the large inequalities in pay that are present in the US labor market today (Markovits 2019; Sandel 2020). Sandel, for instance, argues that “it is unclear why the talented deserve the outsize rewards that market-driven societies lavish on the successful” (2020: 24).

See also: AFFIRMATIVE ACTION; ARENDT, HANNAH; ARISTOTLE; DESERT; DISCRIMINATION; EQUALITY OF OPPORTUNITY; GLASS CEILING; JUSTICE; MILL, JOHN STUART; MOZI; PLATO; RACISM; RAWLS, JOHN

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