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Meritocracy and inequality – exploring a complex relationship

Merytokracja i nierówności – badanie złożonej relacji

A B S T R A C T

Recent studies have suggested that the inequality problem seems to be legitimated by meritocratic
attitudes. Whilst it is argued that meritocracy justifies socio-economic inequalities by defining
individual achievements and efforts as causes for inequality, it is often overlooked how underlying
mechanisms work. This study investigates how meritocracy sustains inequalities. In its mixed meth-
ods explanatory sequential design, it first builds on quantitative data from an International Social
Survey Programme (ISSP) questionnaire, finding a significantly positive and inelastic relationship
between inequality acceptance and meritocratic beliefs. Subsequently, a qualitative systematic lit-
erature review is conducted, suggesting that the relationship between meritocracy and inequality
may be more circular than previously assumed. Furthermore, the results suggest that people's mer-
itocratic attitudes depend more on their social context than on their endorsement of meritocracy.

Keywords: meritocracy; socioeconomic inequalities; interdependence

S T R E S Z C Z E N I E

Ostatnie badania sugerują, że problem nierówności wydaje się legitymizowany przez postawy
merytokratyczne. Choć twierdzi się, że merytokracja uzasadnia nierówności społeczno-ekonomiczne
poprzez definiowanie indywidualnych osiągnięć i wysiłków jako przyczyn nierówności, często nie
dostrzega się, jak działają mechanizmy leżące u jej podstaw. W niniejszym opracowaniu bada-
no, jak merytokracja podtrzymuje nierówności. W swojej mieszanej, sekwencyjnej konstrukcji

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wyjaśniającej najpierw opiera się na danych ilościowych pochodzących z kwestionariusza, stwierdzając znacząco pozytywną i nieelastyczną relację między akceptacją nierówności a przekonaniami merytokratycznymi. Następnie przeprowadzono jakościowy, systematyczny przegląd literatury, sugerując, że związek między merytokracją a nierównością może być bardziej okrężny, niż wcześniej zakładano. Ponadto wyniki sugerują, że merytokratyczne postawy ludzi zależą bardziej od ich kontekstu społecznego niż od ich aprobaty dla merytokracji.

Słowa kluczowe: merytokracja; nierówności społeczno-ekonomiczne; współzależność

1. Introduction

There is an extensive and often normative scholarly debate on whether inequalities should exist (Akbaş *et al.*, 2019). One of the debate's cornerstones is the notion that inequalities should be reduced. Another cornerstone is the argument that socioeconomic inequalities can be legitimated by the conviction that inequalities are meritocratically deserved. Several scholars believe that one's success is a valid indicator of effort and merit (Mijs, 2019). Because meritocracy places the origin of the social hierarchy in individual merit, it offers a justification for various socioeconomic positions.

While existing research has pointed toward links between meritocracy and inequality (Au, 2014; Solt *et al.*, 2016; Darnon *et al.*, 2018; Roex *et al.*, 2019; Barr, Miller, 2020; Jiménez-Jiménez *et al.*, 2020; Mijs, Savage, 2020), it has not sufficiently addressed how meritocracy and inequality are related. Aiming at gaining comprehensive insights into the linkage between meritocracy and inequality, this study explores the research question: *"How does meritocracy sustain inequalities?"* The main research question is broken down into the following sub-questions: (i) *Are the meritocratic perceptions and practices related to inequality acceptance?*; (ii) *What are the mechanisms supporting the meritocratic attitudes and practices to spread and sustain socioeconomic inequality?*; (iii) *What indicates inequalities persist because of meritocratic perceptions?*

This study aims to investigate underlying patterns in the relationship between inequality and meritocracy. To address the research topic's complexity, the study applies an exploratory, sequential mixed methods design. Next, the identified data is reported, and the deduced findings are analysed. Building on the findings,

a discussion outlines the findings' significance. Finally, conclusions are drawn and recommendations for further research are outlined.

2. Methods

This paper adheres to the social constructivist paradigm since it understands meritocracy and inequality as related through social interaction. It applies an explanatory sequential mixed methods design to systematically enhance the study's quantitative findings with qualitative explanations and contexts (Creswell, 2015). Thereby, the integration of quantitative and qualitative data provides more extensive insights than each individual method and can bridge potential gaps between the datasets. Here, the qualitative systematic literature review seeks to explain the results of the quantitative linear regressions. The study's methodological design aligns with the interdisciplinary nature of the topic, the complementarity of the data, and the in-depth understanding they offer (Palinkas *et al.*, 2011; Creswell, 2015). Therefore, the adopted methodological approach is deemed the most appropriate.

2.1. Quantitative methods

This section investigates the relationship between inequality and meritocracy empirically in a cross-country setup. This paper uses self-reported data from the International Social Survey Programme (ISSP) questionnaire "Inequality", capturing citizens' beliefs and attitudes on inequality and meritocracy (ISSP, 2009). The questionnaire theme is suited for this study's purposes as it captures attitudes towards inequality but also opinions on what should count toward (socio-economic) success. Between 2008 and 2012, the questionnaire was completed by 56.021 respondents in 44 countries, aged 18 and older.

Since we want to describe the relationship between a number of independent variables and a dependent variable, we use an OLS regression model for our quantitative analysis (Hogg *et al.*, 2005). However, one disadvantage of OLS regression models is a missing theoretical grounding of model specification, forcing the results of the analysis to be interpreted as correlations rather than estimates of an econometric model (Hitt *et al.*, 2002). To avoid these concerns, we include academic research in the development of our model. As several variables used in the following analysis are not accurately measurable, we use several constructs in the model. Also, to isolate the belief in the existence of meritocracy and one's personal support for meritocracy, we create two separate constructs.

Recent research has suggested that a variety of factors influence inequality acceptance. For instance, Barr and Miller (2020) argued that qualitative variables, such as age, sex, education, and social status, positively influence inequality acceptance. In addition, Fehr *et al.* (2020) and Niehues (2014) have suggested that religion, employment status, and marital status can also significantly influence the acceptance of inequalities. Also, Niehues suggested that inequality acceptance is positively influenced by redistributive preferences and opportunity preferences (Niehues, 2014). However, since adding both constructs to the model resulted in collinearity problems, the constructs were grouped with inequality acceptance. This has the advantage of providing increased flexibility in the relationship between the dependent and independent variables and enhanced accuracy, whilst retaining the same interpretation of the dependent variable (Hitt *et al.*, 2002). To adopt a holistic approach and limit the omitted variable bias, all relevant variables were added to our estimating equation:

Inequality acceptance – Redistributive preferences – Equal opportunity preferences = $\beta 0$ + $\beta 1$Existence of meritocracy + $\beta 2$Support for meritocracy + $\beta 3$Age + $\beta 4$Sex + $\beta 5$Social Class + $\beta 6$Religion + $\beta 7$Employment status + $\beta 8$Secundary education + $\beta 9$University education + $\beta 10$Marital status + ε

2.2. Qualitative methods

This section builds on the quantitative findings and seeks to explain *how* meritocracy sustains inequality. The systematic literature review allows for a structured alignment of the qualitative and quantitative data through transparent reporting. The systematic literature review is conducted according to the steps of the PRISMA flow diagram (see Figure 1) (Moher *et al.*, 2009). The search strategy, including data collection and selection, applies these stages of selection to academic articles on meritocracy and inequality. Further, the explanatory sequential design is applied by using the seven key terms of the quantitative data as selection criteria for the qualitative data: meritocratic attitudes, meritocratic practises, meritocratic outcomes, sustained inequality, socioeconomic status, equal opportunity preferences, and redistributive preferences.

3. FINDINGS

3.1. Quantitative findings

Table 1 displays the results of the OLS regression model outlined in section 2.1. The model accounts for 28.7% of the variation in the acceptance of socioeconomic inequalities after considering redistributive preferences and perceived levels of equality of opportunity. The findings indicate a significant, positive, and inelastic relationship between acceptance of inequality and support in as well as beliefs in the existence of meritocracy. Specifically, the estimates for meritocracy existence and meritocratic support are 0.336 and 0.253, respectively. The higher coefficient of the first explanatory variable indicates that acceptance of inequality might be more influenced by the perception of meritocracy as observed in society compared to the mere belief in meritocratic ideals.

The added control variables yield the following statistically significant results. The predicted value of inequality acceptance increases with higher levels of education, employment status, and for individuals who are married. In contrast, consistent with Fehr *et al.* (2020), inequality acceptance tends to decrease when an individual identifies as religious. Unlike previous evidence presented by Barr and Miller (2020), who find
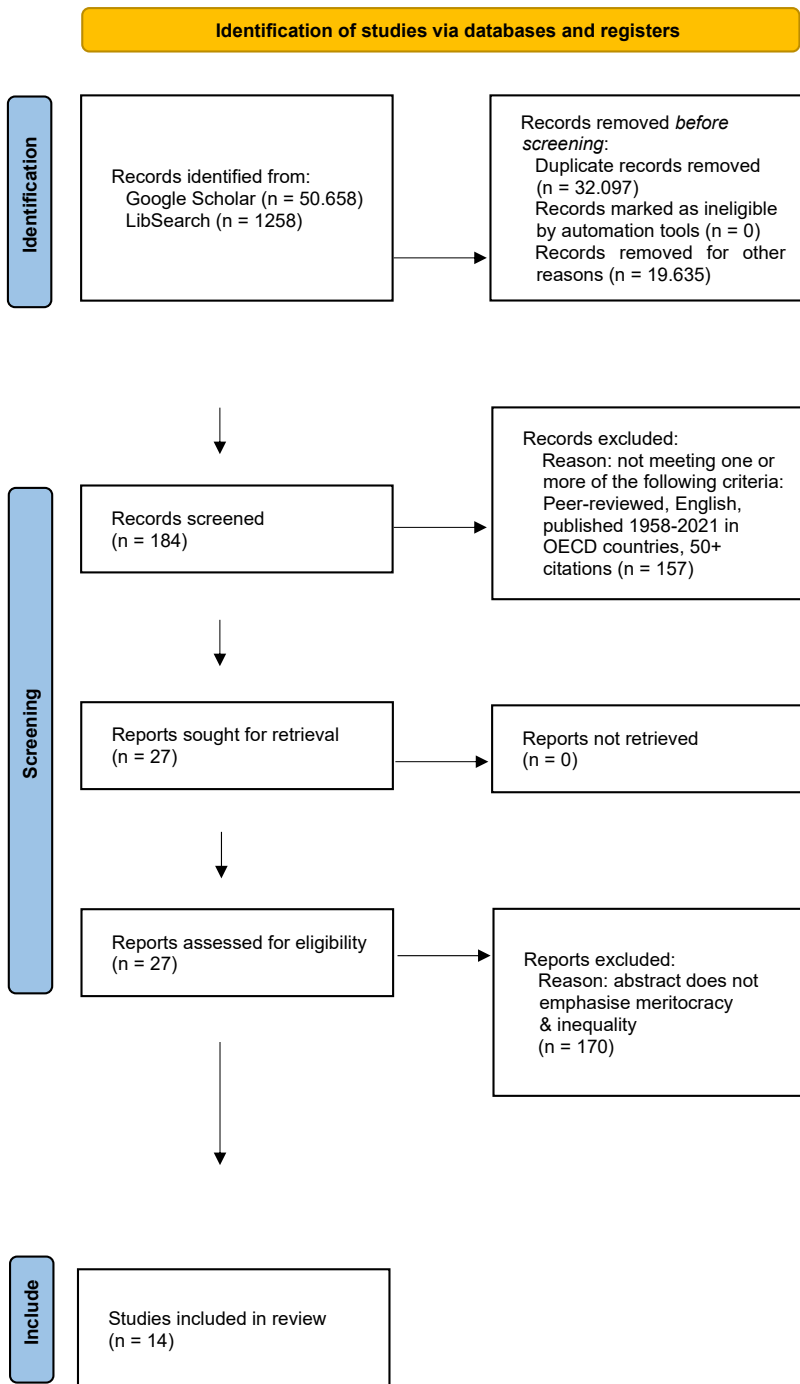
Identification of studies via databases and registers

Identification

Records identified from:
  Google Scholar (n = 50.658)
  LibSearch (n = 1258)

Records removed *before screening*:
  Duplicate records removed (n = 32.097)
  Records marked as ineligible by automation tools (n = 0)
  Records removed for other reasons (n = 19.635)

Screening

Records screened
(n = 184)

Records excluded:
  Reason: not meeting one or more of the following criteria: Peer-reviewed, English, published 1958-2021 in OECD countries, 50+ citations (n = 157)

Reports sought for retrieval
(n = 27)

Reports not retrieved
(n = 0)

Reports assessed for eligibility
(n = 27)

Reports excluded:
  Reason: abstract does not emphasise meritocracy & inequality
  (n = 170)

Include

Studies included in review
(n = 14)

Figure 1. Applying a PRISMA Flow diagram

Source: Page *et al.*, 2021.

Table 1. OLS results

Dependent Variable	Inequality Acceptance / Redistributive Preferences / Equal Opportunity Preferences
Meritocracy:	
Existence	0.336***
	(0.025)
Support	0.253***
	(0.028)
Social Class	0.085***
	(0.011)
Sex	−0.211***
	(0.024)
Age	−0.013***
	(0.001)
Religion	−0.265***
	(0.027)
Education:	
Secondary	0.073***
	(0.028)
University	0.253***
	(0.038)
Employment	0.060*
	(0.026)
Marital Status	0.035
	(0.025)
R2	0.287
Adjusted R2	0,282
N	56.021

Notes: ***p < 0.001; **p < 0.01; *p < 0.05
Source: Results of author's own calculations based on ISSP data.
More detailed explanations are made available by the authors upon request.

a positive influence of sex and age on inequality acceptance, our findings suggest a significant negative relationship.

3.2. Qualitative findings

To systematically navigate how meritocracy sustains inequality and to aptly address the research question 14 articles met the inclusion criteria and included in current analysis. We analyse scholarly articles according to following three main criteria: the use of key terms, main arguments, and the aforementioned sub-questions.

3.2.1. Criterion 1: Analysing the use of key terms

Meritocratic attitudes are the most prominent key term, with the terms "attitudes" and "beliefs" being considered oftentimes equivalent by the literature. McCoy and Major (2007) argue that meritocratic attitudes are socially constructed and held even by those disadvantaged by meritocracy (p. 350). According to Mijs and Savage (2020), these attitudes sustain inequality because they enhance inequality acceptance (p. 403). Mijs (2016) argues that meritocratic attitudes are reproduced in educational systems, thereby legitimising inequalities (p. 14).

Meritocratic practices are referenced by Mijs (2016), who claims they contain hidden discomforts. He criticises the effects of meritocratic practices: "first, the meritocratic norm blames the victim. Second, merit threatens (…) equality of opportunity." (p. 22). *Meritocratic outcomes* find limited attention in the selected articles. Mijs (2016) notes that institutionalised meritocratic outcomes can have unwanted and undesirable consequences, such as sustained inequality (p. 28).

Sustained inequality is mostly referred to as a result of meritocracy in some form. Solt *et al.* (2016) argue that inequality is sustained through elites maintaining the individualistic narrative of meritocracy. Similarly, Scully (2002) maintains that the elite's control of the meritocratic narrative hampers criticisms of it. *Socioeconomic status* is defined by Roex *et al.* (2019) as determined by income. Others argue that in a meritocracy, socioeconomic status is seen as a reflection of merit, putting responsibility in the hands of the individual (McCoy, Major, 2007, p. 341). Kay *et al.* (2017) relate socioeconomic status and belief systems by arguing that people with high status pass on their status and meritocratic beliefs.

Equal opportunity preferences are addressed by Mijs (2016), who argues that meritocracy is a barrier to equality of opportunity (p. 14). He also points out meritocracy does not consider the non-meritocratic factors determining opportunities (p. 14). *Redistributive preferences* are addressed by Roex *et al.* (2019) also Taylor and O'Brien (2017), who assert that one's socioeconomic status does not explain tolerance of income inequality. Further, the authors argue that meritocratic attitudes boost discrepant redistributive preferences (p. 47).

3.2.2. Criterion 2: Comparing articles' main arguments

To get an overview of how the articles relate meritocracy and inequality, their main statements are grouped and compared. The groupings used are "meritocracy sustains inequality", "inequality sustains meritocracy" and "meritocracy and inequality sustain each other". The first grouping includes articles arguing that meritocracy sustains inequality. Many authors hold that meritocracy leads to inequality because meritocratic attitudes justify and legitimate inequalities (Kay *et al.*, 2017; Scully, 2002; Mijs, Savage, 2020). Furthermore, meritocratic attitudes and practices legitimise and mask structural inequalities (Au, 2014). This dynamic creates a situation in which meritocracy prevents rewards based on individual merit (Mijs, 2016; Roex *et al.*, 2019). Whereas Jiménez-Jiménez *et al.* (2020), also Taylor and O' Brien (2017) relate meritocratic attitude to higher inequality acceptance, Mijs (2016) relates meritocratic education and inequality. However, McCoy and Major (2007) claim meritocracy creates inequality through practices rather than individual attitudes. Overall, most articles only touch upon the relationship between meritocracy and inequality by referring to meritocracy as the cause and sustained inequality as the effect.

The second grouping includes articles underlining that inequality sustains meritocracy. Solt *et al.* (2016) argue that poor people living in areas where inequality is particularly present have stronger meritocratic attitudes. Moreover, the authors maintain that an elite controls social narrative and reinforces meritocracy. However, Heiserman and Simpson (2017) argue that cues about inequality from one's environment led to assumptions of different merit.

The third grouping includes articles arguing for mutually reinforcing meritocracy and inequality. Although three articles refer to interconnected meritocracy and inequality, only Mijs and Savage (2020) do so explicitly. They argue that meritocracy obscures and legitimises inequality, whereas inequalities reinforce smaller

circles of reference for people's standard of living, encouraging people to underestimate inequality (p. 404). Other authors imply a mutually reinforcing relationship between inequality and meritocracy (Solt *et al.*, 2016; Kay *et al.*, 2017; Roex *et al.*, 2019).

3.2.3. Criterion 3: Answering the sub-questions

The key arguments show that all authors apart from Granaglia (2019) answer the first sub-question with a decisive "yes". The weakest "yes" is given by those who focus on meritocracy sustaining inequality by masking its true, systematic extent (Au, 2014; Taylor, O'Brien, 2017). A more decisive "yes" is given by those who assert that meritocratic attitudes make it less likely for people to question inequalities, and more likely to accept them (Kay *et al.*, 2017; Roex *et al.*, 2019; Mijs, Savage, 2020). Mijs (2016) reasons that people have become more "passive" toward inequalities because their increasing meritocratic beliefs have been correlated with increasing income inequality (p. 16). A concrete example is given by one paper's claim about meritocratic attitudes negatively affect redistributive preferences (Jiménez-Jiménez *et al.*, 2020). An even more decisive "yes" is given by those who consider meritocratic attitudes as legitimising and justifying inequalities (Scully, 2002).

McCoy and Major (2007) hold that people's attitudes toward inequality are not even decided by people themselves or by their personal opinion on meritocracy. Instead, external meritocratic practices function as cues for high inequality acceptance (p. 350). Lastly, Mijs (2016) asserts that meritocracy necessarily entails inequality since "any definition of merit must favour some groups in society while putting others at a disadvantage" (p. 14). Overall, the literature sample confirms a significant relationship between meritocracy and inequality.

The second sub-question is only indirectly answered by most authors. To match the sub-question, the analysis only includes articles whose starting point is meritocracy. The mechanism most frequently referred to is class-based; an elite supports meritocracy to sustain socioeconomic inequalities to their advantage (Kay *et al.*, 2017).

By setting up meritocratic practices, elites can trigger a psychological mechanism where unprivileged individuals justify disadvantages by overlooking discrimination (McCoy, Major, 2007). This claim is backed up by Roex *et al.* (2019) reference to the structural position thesis. In this way, elites benefit disproportionately from the socially constructed narrative of meritocracy.

Another mechanism links meritocracy to inequality. Mijs and Savage (2020) refer to the mechanism as "individualisation of class" (p. 400) in which people evaluate their surroundings from their personal view rather than from a group-based one. Thereby, the process of individualisation isolates the individual because "misfortune is understood as personal failure" (Mijs, 2016, p. 14). McCoy and Major (2007) consider the American dream an example of the individualisation of societal processes.

The last mechanism supporting meritocracy in sustaining inequalities is the educational system. Current structures in admissions and selection procedures claim to be meritocratic, which masks structural inequalities (Scully, 2002; Au, 2014). These authors reason that university admissions sustain inequalities based on socioeconomic status because the latter is crucial for selection criteria. Mijs (2016) touches upon several mechanisms and concludes that we should change the narrative of meritocracy and realise that income often does not reflect merit due to structural inequalities (p. 21).

The articles examined seem to give a limited answer to the third sub-question. Again, only articles taking meritocracy as a starting point are included in the analysis. Regarding the first mechanism of elitism and classism outlined above, Kay *et al.* (2017) argue that inequalities are sustained through parents' meritocratic beliefs. Similarly, McCoy and Major (2007) state that people who have been primed through meritocratic practices overlook structural inequalities (p. 349). Further, Mijs and Savage (2020) show the statistical relationship between inequality and meritocracy.

Regarding the mechanism of individualisation, Roex *et al.* (2019) argue that meritocracy sustains inequality by stigmatising limited success. A similar system-justifying effect was

observed when the relationship between perceived and ideal inequality was stronger for respondents endorsing strong meritocratic beliefs. Regarding the mechanism of education, Mijs (2016) argues that elitism and the educational sphere overlap. Au (2014) argues that meritocracy helps sustain inequalities because lower test results of systematically marginalised people are not questioned. Kay *et al.* (2017) hold that parents with more education are increasingly seeking a better education for their children (p. 2174). Further, Warikoo and Fuhr (2014) indicate that elite students overestimate the effects of individual effort in comparison to other factors.

3.3. Mixed method data

The significant relationship between meritocracy and inequality established by the quantitative findings could be confirmed through qualitative analysis. According to the articles analysed, meritocracy and inequality go hand in hand due to several mechanisms, including education, societal narratives, societal context, individualism, social identity, and elitism. Lastly, the qualitative analysis shows that the relation between meritocracy and inequality may be mutually reinforcing.

4. Discussion

The mixed-methods findings provide a comprehensive overview of mechanisms through which meritocracy can sustain inequalities. Whilst it is evident that most scholars claim meritocracy legitimises and justifies inequalities, our mixed-method results point toward a bolder claim: educational inequalities, which often translate into socioeconomic ones, may be encouraged by the educational system. Firstly, the quantitative data indicates a significant relationship between inequality acceptance and the perceived existence of meritocracy and support for meritocratic beliefs. Secondly, the qualitative review points toward a so far disregarded explanation for the interconnection between meritocracy and inequality: they may reinforce each other.

A core quantitative finding is that in predicting inequality acceptance, the coefficient for the existence of meritocracy is larger than the coefficient for the support of meritocratic

ideals. Therefore, meritocracy is perceived as most legitimate when people believe inequality is the outcome of a meritocratic system. People's personal endorsement of meritocratic ideals plays a subordinate role. This finding aligns with Mc-Coy and Major (2007), who argue that higher inequality acceptance is explained by external cues, not by the endorsement of meritocracy. The quantitative results must be interpreted with a level of caution; reverse causality and even circular causal chains – as suggested by the qualitative findings – are likely to persist.

Arguably, the added value of this research lies in its novel discussion of meritocratic transmission channels on inequality and its social acceptance. Whilst the inequality-legitimising narrative of meritocracy does sustain inequality, this seems to be only one part of the bigger picture. As inequality reinforces smaller circles of reference for people, their perception of inequality is skewed. The results suggest that people's attitudes toward inequalities and redistribution are intertwined with thinking about the very origins of inequalities. If individuals believe them to be the result of a meritocratic system, they are more likely to accept and endorse them. Judging whether one lives in a meritocracy is, however, is influenced by persisting inequalities. Our research points toward a new way of understanding and studying the relationship between inequality and meritocracy. The disentanglement itself remains up to future research.

5. Conclusion

This research has shown that inequality may sustain meritocracy in a circular, perhaps even mutually reinforcing relationship; where meritocracy obscures and legitimises inequality, inequalities reinforce smaller circles of reference, encouraging people to underestimate how present inequality is. The relationship can be characterised by several mechanisms, including elitism, individualisation, and education. Another significant finding is that inequality acceptance is best predicted by the perceived existence of meritocracy – not by the deliberate support of meritocratic attitudes. However, further research is needed to clarify the interdependence mechanisms in order

to state confidently *to what extent* meritocracy and inequality are interrelated.

The findings imply that approaching meritocracy may require an even more cautious attitude than previously assumed. If endorsing meritocracy is more of a learned behaviour than a deliberate choice, it is difficult to question its implications. Thus, in order to avoid succumbing to undesired socioeconomic divisions reinforced by meritocracy and inequality, a collective paradigm shift is needed. In conclusion, it is worthwhile to reduce the effects of meritocracy on inequality by limiting meritocratic practices and attitudes. The key to such limitation is a fundamentally critical approach to the relationship between meritocracy and inequality. Education could play a key role in encouraging a more equal society by teaching these critical approaches.

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