

# The idea of social equality in a meritocratic society – a cultural approach

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## **Abstract**

Subject of research: This work philosophical analysis is concerned with the relation between the ideas of quality and meritocracy. The axiom of liberalism, the equality of opportunities, states that thanks to their endeavour, individuals have a chance to improve their life quality. Thus, people with similar abilities have a similar chance to achieve their goals. Meritocracy was to guarantee the implementation of the tenet. The attempt to build a meritocratic society is not a novelty in the history of the humankind. The history of western civilisation is the arena of a dispute between the supporters of meritocracy over democracy, like the doctrine of Plato, and the advocates of democracy at the expense of meritocracy, which is represented by the philosophy of J. J. Rousseau. A system of education based on the principles of the philosophy of Confucius, is worth consideration. The philosopher claimed that putting well educated officials on top of the social hierarchy was the measure to eliminate egoism, nepotism and ethnocentrism and accomplish the ideal of a full social harmony. At present meritocracy is widely criticised. It is reproached for creating a new oligarchy, since it encourages the process of segregation of individuals on the base of their natural abilities. There also the advocates of a compromise between the extremities of meritocracy and egalitarian populism.

Purpose of research: The subject of the work was to pay attention to the relations between the ideas of equality and meritocracy in the chosen legal paradigms.

Methods: a theoretical and historical discourse.

**Keywords:** *equality, meritocracy, legal cultures.*

## **Introductory notes**

In the Polish Scientific Publishers' dictionary, the entry "meritocracy" is defined as a futurological concept, under which the 21<sup>st</sup> century was

supposed to be the century of the reign of the highly educated, talented and competent( in their fields ) people. The second entry defines meritocracy as the system of the government of the above (2005, p. 811). A Latin etymology of the concept is connected with the system of governance based on accomplishments, competence (*meritas*) and the expression meaning referring to the very essence of the matter (*meritum*).

The concept was coined by a British sociologist, Michael Young, who, in his work *The Rise of Meritocracy*, described a dystopia of a society based on meritocratic differences. He wrote: "The loser faces the choice of acknowledging himself a failure or living in the negation of the system" (Young, 1994).

Meritocratic societies must be blamed for the condition of modern democracies. From the perspective of the several past decades they can be also classified as anti-democratic conceptions. According to Young, meritocracy is a class of people, who have reached the top of the social hierarchy thanks to a true equality of the opportunity. The consequence is a permanent feeling of inferiority of those with a lower status, which derives from the fact that they are really worse, and not from the fact that they have been deprived of equal possibilities, like the lower-class people from the past (Young 1971, cited in White, 2008, p. 100).

A profound analysis of meritocracy was performed by M. Walzer (Walzer, 2008, pp. 203–230) and P. Rosanvallon. The second author, having analysed the origin of the French crisis, notices that since the 1980s, a society's wealthiest members have claimed an ever-expanding share of income and property. It has brought he end to the age of growing equality launched by the American and French revolutions (Rosanvallon, 2013, p. 28). A passive social policy adopted by the state governments started to reward inactive people, depriving them of a motivation to act, and therefore enabling them to stay passive (Rosanvallon, 1995, pp. 28–41, pp. 107–118). Therefore, the crisis of the 1980s was not the return of the problems of the times before the rise of the French welfare state. R. Pyka claims that at the basic level, it was driven by financial problems and social benefits inadequately reflecting social needs, at the social- philosophic level, it interfered with the fundamentals of social solidarity and, widely questioned at present, social rights (Pyka, 2008, p. 51). And just as significant as the social and economic factors

driving this contemporary inequality, has been a loss of faith in the ideal of equality itself. In the eighteenth-century, equality meant understanding human beings as fundamentally alike and then creating universal political and economic rights.

At the beginning of the 20th century, after some revolutionary movements, a welfare state emerged. The crisis of the 1970s brought a collapse of the precept and the slide towards social inequality in the years that followed. As Rosanvallon reasons, there is no returning to the days of the redistributive welfare state. Yet, it is essential to revitalize the idea of equality according to principles of singularity, reciprocity, to reflect modern realities.

Social stratification has existed in the majority of societies throughout the history. The equality before the law is a huge achievement of the philosophy and practice of liberalism of the last 300 years. As L. Balcerowicz writes, a radical and consequently pro-liberal view is expressed by a postulate of a maximal liberty for the maximal number of people, a fusion of the sphere of the state coercion reduced to a minimum and the equality before the law (Balcerowicz, 2012, p. 30).

In liberalism the idea of social equality is not affiliated, because people are not equally provided with a talent, health or diligence. The axioms of individualism and autonomy are substantial. The other fundament of liberalism is the idea of the equality of opportunity. Thanks to their endeavours, individuals can improve their life quality. The principle states that people with similar abilities have a similar chance to achieve their goals, and it is based on the views of Bentham and Mill. They claim a moral legitimacy of everything that is beneficial for a society. As Heywood remarks, it is the total of the efforts taken by the individuals in their pursuit of happiness (Heywood, 2007, pp. 63–65). However, the idea of equality before the law alone is not sufficient to prevent inequality of possibility.

The history of the fight for human rights is connected with their community character originating from cultural tradition. As J. Raz reasons, the protection of many rights was connected with a fight for the autonomy of an individual, however its driving force was the concern to secure collective goods, without which individual rights would not be able to serve their purpose (Raz, 1986, p. 251). This approach resulted in the rise of democratic solutions and pluralism. Meritocracy, in the opinion of H. Arendt, may

deepen the social inequality that has been existing for recent years and, in the extreme, threaten the foundation of democracy (Arendt, 1994, p. 216).

## **Equality and individualism in an ancient *polis***

The first concepts concerning social inequality were formed in the ancient times. The history of western civilisation is the arena of a dispute between the supporters of meritocracy over democracy, like the doctrine of Plato, and the advocates of democracy at the expense of meritocracy, which is represented by the philosophy of J.J Rousseau.

In his work *The Republic*, the author creates the vision of an utopian *polis*, governed by the wisest class of citizens. The system proposed was an ideal of a state. The philosopher developed the theory of education that reflected the internal order of a soul- psyche of an individual (Środa, 2012, p. 59) The vision of *kallipolis* is the weird fusion of an idealistic political system of Sparta and ethical and philosophic views of Plato. As Barwicka- Tylek and J. Malczewski claim, the objective of an well-managed *polis* is not merely to secure a material welfare of citizens, but first and foremost, to embody moral and ethical values, good and justice, to educate a young person and shape a young soul properly (Barwicka-Tylek, Malczewski, 2014, 43–44). Plato claims that a soul of every individual has a three- part structure, and the logic (thinking part) should control the appetitive, (desires and wishes) in order to keep the healthy, constructive balance. Analogically, an ideal state comprises members of three distinct classes: rulers- philosophers, soldiers, and craftsmen. The first must have the virtue of wisdom, the second need the virtue of courage, and the last must exhibit the virtue of moderation. Plato held that the *polis* functions properly thanks to the separation of functions and the specialization of labour.

He wrote: 'I said: 'Until philosophers are kings, or the kings and princes of this world have the spirit and power of philosophy, and political greatness and wisdom meet in one, [...] cities will never have rest from their evils' (Plato, 1994, p. 207). The separation of labour was supposed to realise the rule of justice. Social differences built the ladder of a meritocratic hierarchy. The idea of consumer communism accessible exclusively to the two upper classes seems especially unethical. As L.Dubel states, such a system in Plato's theory prevents extensive privileges and nepotism in the class of

philosophers (Dubel, 2012, p. 63). The conception of the control on human reproduction, which was compared to a dog or horse selective breeding, is especially controversial. Mating was only allowed at a certain age, and the partners were chosen by means of a fixed lottery, which aim was to match the best men and women to get the best offspring. The process of education and multi- level selection was supposed to guarantee the best, most talented people to keep public positions.

Plato's theory of forms has a lot in common with the conception of natural law. The doctrine implies that a soul possesses the memories of the true knowledge from the time before its birth, some virtues, which can be recollected at the highest level. Therefore, those whose abilities to reason are most developed, can identify and recognize the stratified memories. This implies, though, that the *arte* is fully available to very few, while the majority must, as Ch. Rowe expressed it, be deprived of self-reliance (Rowe, 2000, p. 164). At the time of an ancient *polis*, the differences between people were considered natural and innate, and belonging to a certain social class was lifelong. Plato held: "But when the (...) man whom nature designed to be a trader, having his heart lifted up by wealth or strength or the number of his followers, or any like advantage, attempts to force his way into the class of warriors, or a warrior into that of legislators and guardians, for which he is unfitted, and either to take the implements or the duties of the other; or when one man is trader, legislator, and warrior all in one, then I think you will agree with me in saying that this interchange and this meddling of one with another is the ruin of the State" (Plato 1990, IV, 434 a-c).

In many ways, it was the meritocracy that Plato advocated in his most famous work. He saw the dangers evident when people of power rise to positions of authority without the needs of the whole governing their motives. As a result, selfishly intelligent people make decisions that are contrary to the good of the whole, though usually personally beneficial. He believed that this is one of the greatest problems facing civilization and democracy.

Also a disciple of Plato, Aristotle, did not consider social inequality a big problem. The only danger was a potentially risky and status quo threatening, social unrest (Woźniak, 2011, p. 15).

Both Plato and Aristotle criticized democracy as an unjust system that requires the devotion of human masses, offering them the right to keep

certain functions, thus being involved in the process of governance, regardless of their inability to proceed the task properly due to their lack of skills and education (White, 2008, p. 45). The ideal of a platonian state embodies the idea of meritocracy in its political aspect. The disciple of the philosopher held a similar belief, and justified the existence of “natural slaves” with their limited intellectual abilities. The authority was reserved to those wise and virtuous. However, he is not as rigorist in admitting the access the class of rulers to a limited group as Plato. Aristotle approves the right of wealthy citizens, regardless which social class they originate from, to rule the state.

Both conceptions represent the idea of a power naturally prescribed to a group of people because of their better abilities, which alone validates their right to rule the others. Such a “natural aristocracy” comes out of the authority of wise and virtuous people. These axioms did not, however, exist in dependently, they were connected with the idea of collective goods.

## **Meritocracy in a Chinese model**

The system of state organization where the authority is held by intellectualists was also typical of a Chinese philosophy. Its key elements appear in the teachings of Confucius. In 130 BC, the texts by Confucius became the foundation of the education provided to state officials, until the collapse of the Chinese Empire in 1905.

What were the institutional and organizational principles of a Confucian model of meritocracy that influenced a quarter of the world’s population? The reason for Confucius’s political activity was a pragmatic need to commence a positive social change. The starting point was an ideal man, a virtuous ruler, who was surrounded by equally virtuous nobles who were able to govern the state on his behalf. The philosopher postulated the replacement of a hereditary aristocracy with the aristocracy of intellect, that comprised of those who had managed to achieve the intellectual perfection, regardless their social origin (Künstler, 1983, p. 131). Education and art (*wen*) strengthened the whole society, and people’s hearts. *Wen* is the arts of peace, as opposed to arts of war, such as music, painting, and all aesthetic and spiritual manifestations of culture (Smith, 1995, p. 111). In a political dimension, the country which represents the highest culture, and deserves the respect of whole societies, is victorious.

One of the duties of a *wen* individual was the critics of an improper government, demonstrating good practices, revealing menaces and an active participation in a social life (Kola, 2011, p. 128). In a Chinese social hierarchy well educated bureaucrats were positioned on top, whereas soldiers were located at the bottom. Thus, the platonian ideal of a king-philosopher was reflected. Confucius expected that the effort of overcoming selfishness and nepotism, acting exclusively for the sake of the welfare of a local community, and ethnocentrism would award an individual with a nobility and a gust of humanity at its fullest.

The Confucian system comprises an element of a specific democracy which guarantees all citizens the opportunity to hold an office, and at the same time, respecting the virtues and nobilities cumulated by the preceding generations, approves hereditary privileges.

As X. Yao writes, the foundation of the Confucian anthropology is the confidence in a human ability to transform the world, and the possibility to educate and develop an individual (Yao, 2009, p. 284).

Education (*hüe*) is necessary to prepare an individual to perform the role of a state official. However, it does not mean acquiring new sciences. *Hüe* is achieving the perfection which is laid in the past. This is the only way a candidate for a state office can accomplish a transcendent morality and possess the necessary virtues. This method was acknowledged the only adequate for a man attained to a high office, whose aim was to serve the society. Men, apart from their social duties, were obliged to take care of their families properly.

It is a servitude to a wise ruler, as Künstler remarks, that differs a man of dignity from an ignorant person. A noble man does not need to achieve many skills, contrary to an ignorant man, who performs menial functions in the society (Künstler, 1983, p. 132). A noble man is guided by rectitude and fairness. He should be ordered by the morals and it is to shape his ethic.

Following Confucius teachings, cultural achievements were rewarded in a political sphere. They gave the Chinese civilisation the momentum to assimilate to an extend which, as H. Smith claims, at its climactic manifestation, had never been surpassed (Smith, 1995, p. 120). Confucianism is widely considered to contribute to the transformation of an autocratic Chinese empire into a bureaucratic feudal state. An extensive system of

education and assessment, as Kola notes, formed the hierarchic ladder in a state administration system up to the highest, central level. In result a kind of a community, with a strong ethos, a sense of social mission of a service for citizens and the state constituted itself (Kola, 2011, p. 131). Thus, Chinese meritocracy was driven by the ideas of justice and equality. The emperor aimed at weakening the position of the hereditary aristocracy and gaining the best people to hold the positions of state officials. To serve the idea, a system of scholarship was introduced to provide with equal opportunities for the emperor's subjects. M. Walzer notices that the conception of meritocracy was not implemented fanatically. Having passed their exams, the candidates had to undergo a stage of a practical selection process (Walzer, 2008, p. 217, cited in T. Kalbarczyk, 2014, p. 35).

Chinese meritocracy has been a central element of the Chinese political culture. A. F. Kola expresses a view that stimuli originating from the eastern civilisation should elicit and enforce certain ideas in the extremely different western culture. Yet it should not accredit to a search of some cultural universals but a constitution of a trans-cultural model of philosophy and academic discourse (Kola, 2011, p. 122). The author claims that in an era of multicultural animosities, the education of social elites based on the ethos of social commitment, with transcendental religious categories excluded, since their epiphanic nature accounts for numerous conflicts in multicultural societies, would allow to prevent social friction (Kola, 2011, p. 135).

As a matter of fact, a model of Chinese meritocracy has been plagued with a pathology of nepotism, corruption and excessive privileges of the well-born. The communist China under the reign of Mao Zedong rejected the political meritocracy that had been introduced two thousand years earlier by Confucius. Revolutionary energy and military protection of the country was a driving force of a new state. A political entity of a modern, powerful China is by no means unthreatened, thus efficient and competent state officials are its main concern.

Fast changes launched by the economic growth of the last decade and a deepening social stratification have devastated a fundamental for a Chinese culture balance. Therefore, the government propose to restore the national heritage of the Confucian China with the state control based on the doctrine of meritocracy.

## Equality of opportunities and meritocracy – a modern face of meritocracy

The conception of equality of opportunities is connected with the idea of social justice. In a moral democracy – as S. White writes – citizens expect the rights and institutions to act with a just respect of the interests of all people. So, a kind of social and economic inequality that influences a right treatment of all citizens must be identified (White, 2008, p. 75). Meritocracy seems to match with the rule of fairness. However, a separation of meritocracy and the idea of quality forecasts the regression to a class society where the most talented (and frequently the wealthiest) individuals belong to elites. As M. Taylor suggests in a document *Meritocracy without equality is wrong and cruel*, neglecting the inequality in favour of the mobility results in the negation of the universal dignity of an individual and the affirmation of differences between people deriving from individual talents or abilities. The ideology of meritocracy favours the richest and legitimises the contempt for the poor. The cooperation of the mobility and the demand to decrease inequality and to guarantee respect for each individual, regardless his talent and natural endowment, is the requisite (Taylor, 2016).

What is the equality of opportunity within the meritocracy? In a weak meritocracy, a discrimination exists in either public or a private sector. Here, the postulate of equal opportunity incarnates itself in a demand to abolish discrimination in the sectors of education of employment. Otherwise, employers could selectless competent candidates<sup>1</sup>. Taking non-relevant criteria into consideration during the recruitment process, *de facto* challenges meritocracy, insomuch as the access to certain social functions is limited by the criteria which are of less or no importance for the proper performance of those functions. In the majority of democratic societies there is a consensus regarding anti-discrimination legislation with reference to state institutions. However, advocates of a conception of the free market question such an interference in the freedom of an employer to define competences of his potential employees.

A strong meritocracy, as W. Woźniak claims, is the bedrock of a standpoint which, apart from a disapproval of discriminative practices, concurrently promotes a real equality of opportunity (Woźniak, 2012, p. 109). A strong meritocracy approves the objective of a weak meritocracy, but additionally

pursues an individual's background and initial potential. S. White claims that the rationale of the replacement of a weak meritocracy by a strong one, is both its effectiveness and justice (White, 2008, p. 83).

The fundamentals of liberalism lay within the belief that a moral pluralism of a society is a natural state, because it expresses an individual's autonomy. The state is not allowed to take any action which, as H.L.A. Hart points, favours or promotes a particular religion, philosophy or *weltanschauung*, or supports the followers thereof (Hart, 1984, p. 77). The principle of freedom of all individuals guarantees an autonomy of each individual to act according to their own beliefs. Such an approach is reflected in an assumption that rulers should equally respect all citizens. As R. Dworkin asserts, the principle of equality manifests itself in the freedom of choice of a conception of a good life that it gives to people. What follows, is the prescript to perceive and treat each human as equally valuable (Dworkin, 2006, p. 166). In this context, the meritocracy appears adverse, because while exalting individualism and competition, it changes market mechanisms and educational systems to promote the most talented. Those, whose access to elites is denied, are deceived by the ideal of egalitarian and universal education (Borelli, 2010).

S. White enlists the following arguments against meritocracy: a threat to freedom, an inequality status, inconsistency and unfairness towards less gifted citizens (2008, p. 95-106). Successively, the advocates of meritocracy criticize democracy, under which incompetent people are allowed to gain high state offices. This view is shared by D. Bell (Bell, 1973), Z. Brzezinski, D.K. Price. Also, as W. J. Cynarski states, the government of experts ("aristocrats of soul"), the best and the wisest, will assure a steady and balanced advancement of the human civilisation, albeit numerous social conflicts (Cynarski, 2001, p. 176). A proficient government will contribute to the development of the system towards the harmony, in accordance with Confucianism.

Walzer suggests that the attempt to find an equilibrium between the extremities of meritocracy and egalitarian populism would be a solution. Accordingly, the equality of opportunity should be a decisive factor while filling certain public offices, whereas the desire to establish a 'common public service' based on the endeavour to the absolute equality of possibilities must be regarded as irrational and dangerous, as it contradicts democracy and pluralism (2008, p. 271). In capitalism, meritocracy may negate human

solidarity. The notion of constant perfection to keep a leadership position, a nonstop rivalry and a perpetual evaluation generate stress and destroy a sense of brotherhood and belongingness, which hinders social stability.

## Final remarks

A historic perspective provides with the material on the subject matter such as a controversial Plato's conceptions or the ideas by the "head teacher for 10000 years", Confucius, a pioneer of a public education. Confucian doctrine of meritocracy crystallised numerous aspects of the Chinese ancient civilisation and has symbolised the moral standards in Chinese politics and philosophy. In western civilisations, public offices are held in accordance with the rule of the sovereignty of the society rather than the acknowledgement of merits. In China, the Confucian heritage ordains that government elites recruit from a well- educated people who are obliged to develop their competences continually. They start in the lowest level of bureaucratic hierarchy. However, meritocracy is plagued with a huge corruption<sup>2</sup> and causes a sense of injustice of a part of the society.

As Aristotle said, man is a social creature by his nature (*zoon politicon*). At a global scale, societies face a challenge to form a modern system of education anchored in science and emotions. Confucian meritocracy included the idea of a citizen being concerned with himself and others. A modern system of education neglects the importance of inner development, and a western variant of meritocracy fosters the omnipresent rivalry. The West focuses on scientific study of external phenomena, whereas the East shows the insight into the sphere of spirit. The fusion of the two may bring a new quality of the perception of humanity.

In his considerations over the nature of live S. Nachmanovitch wrote: "We have the whole nightmare-history of political revolutions against bloody regimes, replacing them by still more bloody regimes, to teach us that that is not the way out. The only way out is a spiritual, intellectual, and emotional revolution in which we learn to experience as biological facts, first-hand, the interlooping connections between person and person, organism and environment, action and consequence" (Nachmanovitch, 2001).

Finding a balance in the economic and social spheres and protecting the equality of opportunities should become the main concerns of a present

discourse on meritocracy. The exertion to achieve an intellectual perfection must not be the excuse for social inequality or a pretext under which undeserved privileges are granted.

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## Endnotes

- <sup>1</sup> Especially when a job selection is based on the factors such as: nationality, sex, religion or sexual preferences. In such cases, anti-discrimination legislation is legitimised.
- <sup>2</sup> According to the information issued by The Central Commission for Discipline Inspection of the Communist Party of China in 2015 almost 300 thousand high officials were punished for corruption. Among them, 80 thousand were given severe penalty, including a degradation. 'GazetaPrawna', 07. 03. 2015

