Psychologising meritocracy: A historical account of its many guises

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Abstract

Measured by psychologists, conceived in critical terms, popularised as satire, and exploited by politicians, *meritocracy* is a dilemmatic concept that has changed its meanings throughout history. Social psychologists have conceptualised and operationalised meritocracy both as an ideology that justifies inequality and as a justice principle based on equity. These two conceptualisations express opposing ideas about the merit of meritocracy and are both freighted ideologically. We document how *this* dilemma of meritocracy's merit developed from meritocracy's inception as a critical concept among UK sociologists in the 1950s to its operationalisation by U.S. and Canadian social psychologists at the end of the 20th century. We highlight the ways in which meritocracy was originally utilised, in part, to critique the measurement of merit via IQ tests, but ironically became a construct that, through its psychologisation, also required measurement. Through the operationalisation of meritocracy, social psychologists obscured the possibility of critiquing meritocracy and missed the opportunity to offer alternatives to a system that has been legitimised by their own work. A social psychology of meritocracy should take into consideration

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the ideological debate around its meaning and value and the implications of its measurement and study.

Meritocracy has a long and often contradictory history. It emerged as a critique of an unequal society and then became a synonym of justice, grounded in equal opportunities and equity of outcomes. More recently, meritocratic ideals lie in principles that directly connect hard work and positive life outcomes, silencing the effects of sociopolitical influences such as marginalisation, poverty, or access to "good" education (Bullock & Lott, 2010; Mijs, 2021). Notions such as "If you work hard and meet your responsibilities; you can get ahead, no matter where you come from, what you look like, or who you love" (Obama, 2013), exemplify the prevalent meritocratic myth that exists within contemporary society.

Meritocracy appeared for the first time as a word in the late 1950s. However, it was from the begin of the 21st century onwards that the psychological interest in meritocracy rose exponentially, with more than 300 publications on PsychInfo listed between 2000 and 2021 in comparison to 50 publications in the second half of the 20th century. While interest in meritocracy between the 1950s and 2000 focused on what meritocracy was, in 2000, the debate shifted to how it worked in relation to different constructs such as: (a) race (e.g., O'Brien et al., 2009; Schultz & Maddox, 2013), (b) White privilege (e.g., Knowles & Lowery, 2012; Knowles, et al., 2014), (c) class privilege (e.g., Phillips & Lowery, 2020), (d) gender (e.g., Foster et al., 2006; Garcia et al., 2005; Liss et al., 2001; Major et al., 2007; McCoy & Major, 2007), (e) feminist identity (e.g., Fitz et al., 2012; Girerd & Bonnot, 2020; Liss et al., 2001), (f) immigration status (e.g., Wiley et al., 2012), (g) political orientation (e.g., Echebarria Echabe, 2014), (g) emotions (e.g., Horberg et al., 2013), (h) educational selection and assessment (e.g., Darnon et al., 2018; Wiederkehr et al., 2015), (i) social class (e.g., Bullock & Lott, 2010), and (j) collective action (e.g., Foster et al., 2006; Hardacre & Subašic, 2018), among others. Social psychologists' investments in "meritocracy" have never been greater.

To study meritocracy's relationship to these constructs, psychologists measured it with a variety of scales, tapping into different nuances of "merit." Some authors routinely drew on the "merit principle scale" (e.g., Bobocel et al., 2002; Knowles & Lowery, 2012; Son Hing et al., 2011), while others (e.g., Pratto et al., 1994) broke meritocracy down into different beliefs such as the belief that the world is just (McCoy et al., 2013) and the belief that success is linked to hard work (Darnon et al., 2018; Goode et al., 2017). Researchers also used the "belief in individual mobility scale" (e.g., Major et al., 2007) and the "belief in status permeability scale" (McCoy et al., 2013) to measure meritocracy. Others developed their own scales, such as the "belief in the meritocracy ideology scale" (e.g., Foster et al., 2006; Lalonde et al., 2000), the "perception of meritocracy inventory" (e.g., Fitz et al., 2012; Garcia et al., 2005), and the "belief that meritocracy

exists scale" (e.g., Son Hing et al., 2011). Meritocracy has also been studied by teasing apart descriptive and prescriptive beliefs (e.g., Cargile et al., 2019; Zimmerman & Reyna, 2013), as an opposition to equality (Tan et al., 2017, 2020), and with the recently developed American Meritocracy Myth Stress Scale (Garrison et al., 2021). It has evolved into the concept of "multicultural meritocracy," which integrates "belonging-ness and inclusion needs, and the need for justice and fairness" (Gündemir et al., 2017, p. 35). When primed, it has been shown to favour an unfavourable treatment of low-status groups (see Madeira et al., 2019, for a systematic review).

   This article examines how social psychologists came to measure meritocracy and elucidates the consequences of measuring it among psychologists. As the range of con-temporary social psychology interest suggests, the psychological conceptualisation of meritocracy and its measurements are not fixed and value-neutral, even after enthusiastic measurement. We argue that the psychological conceptualisation and measurements of meritocracy are a product of a specific history, and of social forces and ideology (Hacking, 1999) that are saturated with hereditarian views.

   Below, we organise the history of meritocracy into the following distinct phases. First, we describe the origins of meritocracy as a term to critique a new unequal class system rooted in education and legitimised through IQ testing in mid-20th century British society. Second, we show how psychologists reacted to the meritocratic critique against IQ measurement and its social consequences. Then, we show how, in the 1970s, U.S. hereditarians and sociologists challenged the negative connotation attached to merito-cracy and proposed a new model of meritocracy as a just consequence of social mobility. Fourth, we describe how, in the U.S., meritocracy was operationalised in the 1980s in relation to questions of gender equality. Then, we show how meritocracy in the U.S. and Canada became psychologised as an ideology and justice principle in the 1990s via measures of individual differences in beliefs about its principles (e.g., Son Hing et al., 2011). Finally, we argue how these measurements contributed to the development of meritocracy as a value-free construct in the 21st century. Before giving an account of the history of meritocracy, we offer an account of the ontological position from which we base our argument.

The ontology of this work

We approach meritocracy from a postmodernist, a social constructionist, and an interdis-ciplinary perspective. First, we borrow from postmodernism the notion of social reality as observer and perspective dependent (Kvale, 1992), to recognise the culturally embed-ded debate and evolution of the meritocracy concept (Cherry, 1995; Danziger, 1997). By shedding light on the historical and social contingency of meritocracy, we mean to chal-lenge the modernist approach to psychological research and its assumption that empirical method is impersonal, objective, and capable of uncovering the "truth" (e.g., Gergen, 1990). Second, we employ a social constructionist lens to analyse meritocracy as a socially and historically situated construct laden in values and ideology. Whilst there are varieties of social constructionist argument, we follow Hacking (1999) in understanding history as the first step to uncover the social contingency and the ideological ground of any construct. Putting history in motion reveals the neutralising mechanisms that

eternalise social constructs and make them appear inevitable (e.g., Bourdieu, 2001). History can empower individuals to see the possibility of alternatives to the status quo. Specifically, this history of meritocracy aims to encourage the rebirth of a social-psychologist critique of meritocracy and to enliven ongoing research. Social psychologists sometimes acknowledge how the failure to articulate the ideological underpinnings of the study of meritocracy could lead to the "dark side" of meritocracy: the perpetuation and maintenance of social inequalities (e.g., Darnon et al., 2018). We hope this history moves social psychologists to understand and articulate the underlying assumptions and values that guide their theorising and measurement of meritocracy (Prilleltensky, 1997).

Third, we adopt an interdisciplinary approach in our exploration of meritocracy. As Allport once stated:

> the modern social psychologist . . . needs an ability to relate the problem to the context in which it properly belongs. Sometimes the context lies in the tradition of academic psychology, often in sociology or anthropology, sometimes in philosophy of theology, occasionally in history or in economics, frequently in the political life of our days. (as cited in Cherry, 1995, p. 1)

Meritocracy is an interdisciplinary topic that has been described and defined by sociology, philosophy, history, psychology, and other social sciences. Assuming the continuous feedback loop between different scientific fields and societies (Gergen, 1973), our history will range across these fields to situate the social psychological development of meritocracy and uncover the system of values that permeates its study. The following paragraphs might *defamiliarise* psychologists with the normalised use of this concept (e.g., Fraser & Gordon, 2019). This defamiliarisation might be the first step toward a constructive dialogue on the values on which psychological work lies and that it aims to communicate (e.g., Prilleltensky, 1997).

The origins

Meritocracy etymologically derives from the Latin word *mereo* (I earn) and the ancient Greek word *κράτος* (strength, power). The Greek root of the word reveals its conceptual contraposition to aristocracy. In fact, while in a meritocracy, social status is believed to be earned, in an aristocracy, it is determined by family ties. In the late 1950s, the word meritocracy was introduced by British sociologists Michael Young (1958) and Alan Fox (1956). Whilst Michael Young sometimes claimed to have invented the term (M. Young, 2001), it also appeared in the article "Class and Equality," published in *Socialist Commentary* by Alan Fox two years earlier (Littler, 2013). Fox (1956) discussed inequalities in the distribution of income, property, educational opportunities, and occupations that "create social differences in patterns of living, values, attitudes and experiences" (p. 11), differences that inhibited solidarity and communication between different social classes. He suggested some policies to minimise social class divisions. He also stated that:

> Inequality will remain as long as we assume it to be a law of nature that those of higher occupational status must not only enjoy markedly superior education as well but also, by right and of necessity, have a higher income into the bargain. As long as that assumption remains—as

long as violations of it are regarded as grotesque paradoxes—then so long will our society be divisible into the blessed and the unblessed—those who get the best and most of everything, and those who get the poorest and the least. This way lies the "meritocracy"; the society in which the *gifted* [emphasis added], the smart, the energetic, the ambitious and the ruthless are carefully sifted out and helped towards their destined positions of dominance, where they proceed not only to enjoy the fulfilment of exercising their natural endowments but also to receive a fat bonus thrown in for good measure. (Fox, 1956, p. 13)

For Fox, meritocracy named a problematic social system that reproduced, legitimised, and naturalised inequality by assuming that both the gifted and the ruthless deserved high status and greater income, occupation, and education than others, by virtue of their "natural endowments."

Two years later, in his dystopian novel *The Rise of the Meritocracy, 1870–2033*, Michael Young (1958) satirised such a newly socially stratified Britain in which nepotism and ascription were replaced by a new social order based on merit. In this fictional society, *merit* was conceptualised as the quantitative combination of intelligence and effort (IQ+E=M; p. 94), and "schools were society escalators for the *gifted* [emphasis added]" (p. 54) in which intelligence testing played a central role. With the work of psychologists, measurable IQ was the means through which pupils could access better schools and enter in the new élites, from which most others were excluded (e.g., p. 70). In essence, IQ tests were considered the instrument of "social justice" (p. 73) as they allowed the most naturally endowed pupils to have the best opportunities and to excel, whilst segregating all others from them. This psychological tool was behind the rationalisation and naturalisation of the new meritocratic class system that was allowing the best to rise to the top. In Michael Young's (1958) fiction, meritocracy significantly changed society, as he comments:

Intelligence was distributed more or less at random. Each social class was, in ability, the miniature of society itself . . . . The fundamental change of the last century . . ., is that intelligence has been redistributed between classes and the nature of classes changed. The talented have been given the opportunity to rise to the level which accords with their capacities, and the lower classes consequently reserved for those who are also lower in ability. (p. 14)

Young critiqued this newly meritocratic social structure as being far from truly equal, because, in this fictional society, intelligence and talent were now aligned with high status and power. The aristocracy of birth was turned into a highly correlated aristocracy of talent. In this fictional society, eugenic principles were recalled and marriages were arranged between people with a family history of high IQ such that:

by 1990 all adults with IQ of more than 125 belonged to the meritocracy. A high proportion of the children with IQ over 125 were the children of these same adults. The top of today are breeding the top of tomorrow . . . . The élite is on the way to becoming hereditary; the principles of heredity and merit are coming together. (M. Young, 1958, p. 176)

Just as the new élites were legitimised to rule because of their merit, so the exclusion, demoralisation, and powerlessness of the lower classes were legitimated by a seeming

lack of merit in M. Young's dystopia. Young's book presented two sides of meritocracy; an ideology that deposed the ascription of status differences based on the aristocracy of birth, and an ideology that gave birth to a new inequality based on attributed talent (M. Young, 1994).

As historian John Carson has shown in his history of IQ testing in the French and American republics, the idea of an aristocracy of talent replacing an aristocracy of birth has particularly deep roots in American revolutionary thought (Carson, 2018). The ways in which IQ testing provides the psychological evidence for variation in natural ability to support meritocratic ideologies varies between countries (e.g., Mulder & Heyting, 1998). In the 1950s, Michael Young (1958) used his satirical book to express concern with inequality and selection specifically in the British educational system, attacking the Eleven-plus examination introduced in 1944 and the Tripartite system of education that it supported from 1944–1976. This system assorted 11-year-old children into grammar schools, secondary modern schools, and technical schools for secondary education on the basis of an exam, closely modelled on the IQ test (White, 2000). Only the most prestigious grammar schools prepared their students for possible university study. The system was designed in part by psychologist Cyril Burt, who became one of the most debated figures in the history of IQ testing by virtue of his strong views about the inherited nature of IQ (Burt, 1909) and questions about data fraud (Mackintosh, 1995). Burt (1909) also compared performance on general intelligence tests (Spearman, 1904) of children of different social statuses arguing that high-status children had a superior intelligence, inherited from their high-status parents. He concluded that "*boys* [emphasis added] of superior parentage are of themselves superior" (Burt, 1909, p. 173) and that the "superior intelligence of the boys of superior parentage was inborn" (p. 176). Burt's aristocracy of talent, and the systems of education it informed were central features of the specific social and national context that Michael Young's (1958) satire of meritocracy was challenging.

According to Young, industrialisation enabled a new mode of justifying and reinforcing the unequal class structure through the guise of achievement and merit, something more subtle and nuanced than ascription by birth (M. Young, 1994, p. 88). However, organising society around achievement values was not always seen as a natural precursor of inequality (see Dahrendorf, 1959).

Whilst Michael Young's (1958) novel is little read by social psychologists in Britain or elsewhere today, he left a considerable footprint on British research and higher education institutions, including the Economic and Social Research Council, the Open University, and the Open College of the Arts (Briggs, 2001). His criticism of the selection of "gifted" working class students by the Eleven-plus exam is echoed in his important work on kinship in working class communities in East London, in which the marginalisation of grammar school students within their communities is described in tragic, not celebratory, terms (M. Young & Wilmott, 1957, pp. 174–178). The tripartite system was increasingly dismantled in favour of comprehensive education and an increasingly child-centred curriculum (see Walkerdine, 1984). This change to the education system did not achieve the ideal of equality. Conversely, merit-focused educational practices, such as standardised tests and educational selection, are still embedded and

normalised in education, making social advantage and merit hard to disentangle (e.g., Darnon et al., 2018; Sandel, 2020; Zimdars, 2016).

The geopolitics of merit

Alan Fox's and Michael Young's critical and satirical concepts of meritocracy occurred during years of considerable economic growth (Piketty, 2020) far beyond the UK. In fact, economic growth in the UK was slow in these years in comparison with other industrial European countries (e.g., France, Germany) and the U.S. (O'Rourke, 2019). After the Second World War, social and political changes in Western societies, along with the Cold War, created a demand for graduates with more than secondary school education in many countries (Trow, 2007). This demand sped up the expansion of higher education (Schofer & Meyer, 2005; Trow, 2007). Economic competition influenced educational reforms aimed at maximising "human potential," given the belief that modern societies needed to expand and exploit human resources to be competitive (Themelis, 2008). The post-World War growth of mass education (Meyer et al., 1992) transformed individuals' social roles and status (Meyer, 1977), restructuring societies significantly. The Cold War was seeing the countries involved in the Eastern and Western blocs marshalling their economic, political, and intellectual forces to establish their dominance. In 1957, the Soviet Union launched the first satellite into space, Sputnik I, which increased the competition between economies. This geopolitical context created a context for the conceptualisation of learning potential as a national and economic resource and "meritocratic" educational selection, talent spotting, and investing in faster development (Selden, 1983). For example, in the U.S., early cognitive insights on the effect of social experiences and interaction on child development were all deployed by Jerome Bruner and others in new forms of science education that aimed to create the conditions for accelerating cognitive development (e.g., Cohen-Cole, 2014). Attention now turns to the ways in which social psychologists have adopted, measured, and discussed meritocracy. A concept that, within the psychological discipline, has been recontextualised in a number of different lights.

Early publications on meritocracy: Shocking the psychological momentum

As highlighted in Michael Young's book (1958) and in Alan Fox's article (1956), psychology and the intelligence testing movement of the first half of the 20th century played an important role in objectifying merit and in shaping meritocracy. Young's satirical concept of meritocracy initially warned against the social consequences of the psychological work that was ranking humans in a hierarchy of excellence according to their measured intelligence. However, the intelligence testing movement allowed psychology to move out of universities into areas of social application (Carson, 2018). The psychological debate on intelligence has a long history and has prompted numerous controversies about individual and group differences and a full account is not within the scope of this article (e.g., Eysenck & Kamin, 1981; Neisser et al., 1996).

Both British and U.S. psychological work on meritocracy (Martinson, 1966; Miller, 1967; Venables, 1965) began to be published as early as the 1960s. These works were deeply influenced by Michael Young's understanding of meritocracy as an elitist social system, rooted in education and IQ, that should be avoided. Within British educational literature, meritocracy seemed to be a system facilitated by policies aimed at expanding higher education. Some authors (e.g., Venables, 1965) argued that widening participation policies would create an educated, merit-based élite that would devalue "ordinary people doing ordinary jobs," creating rebellious youth. Therefore, meritocracy was a problem not only because it was unfair to some, but also because its consequences were destabilising for society.

In the U.S., Michael Young's warning was bringing individual-difference authors to question the practice of identifying and allocating gifted students to special programs and its consequences. This questioning met responses that worried about the risk of wasting talent and escaping the obligation that society owes to the gifted to give them better opportunities to become better human beings for a better society (Martinson, 1966). According to Martinson, a researcher on gifted children, the meritocratic *issue*

> arise[s] because of a basic lack of willingness by many to accept the real meaning of individual differences and to assume the obligations based on such recognition. The notion that some individuals are brighter than others is unpalatable, and the notion that some persons are more capable of successful performance than others is rejected. (p. 16)

Considering and recognising individual differences was the condition sine qua non for a better society. Therefore, Michael Young's meritocracy was challenging the extent to which the psychological research was objectifying inequality through IQ. However, according to the first cognitivists, social and technological development could reframe the problem of individual differences and inequality. Miller (1967), one of the U.S. founders of cognitivism, understood meritocracy as a trigger of a form of scapegoating toward those who were part of the intelligence testing movement. The social organisation was only partly a consequence of the limitedness of human cognitive capacity, or limited intelligence (Miller, 1967). In fact, a world of increasing social and technological complexity required an increased human cognitive capacity. In this context of increasing complexity, cognitive limits could be addressed with some artificial aids such as computers, or with human co-operation. Thus, in the 1960s, as the cognitive revolution took shape, the critical concept of meritocracy butted up against a value system that privileged high IQ, particularly in the U.S.

Meritocracy and genes: The hereditarians

It is in the 1970s that the psychological irony of meritocracy unfolds even more explicitly. Richard Herrnstein, a right-wing Harvard psychologist and hereditarian, took Michael Young's satire a step further. He transformed meritocracy into a psychological paradigm, aimed at legitimising the meritocratic organisation of society using psychological evidence. In 1971, Herrnstein presented a syllogism in the *Atlantic Monthly* stating that (a) if differences in mental ability are inherited, (b) if success requires those abilities, and (c) if earnings and prestige depend on success, then (d) social standing—in terms of earning

and prestige—will be based to some extent on inherited differences among people. In 1973, Herrnstein expanded on his position with the book *IQ in the Meritocracy*, in which he argued that a genetic component of IQ produced a stable hereditary meritocracy. His idea was apparently simple: IQ predicts success because a high IQ is a prerequisite for high-status occupations. As a consequence, Herrnstein described the social structure as rigid, not mobile, and argued that a false belief in human equality could only lead to frustration and anger. Appealing to egalitarian ideology would discourage individuals' potential. Society could not change, as it was based on natural and hereditary abilities; equalising opportunities was a chimera. Ironically, this hereditarian took Michael Young's critical argument and inverted it to argue that meritocracy was not an undesirable and avoidable dystopia, but was inevitable, natural, and even desirable.

This radical, right-wing theorising was, in many ways, an ideological reaction both to the liberal and radical ideas of the social movements calling for greater racial and gender equality of the previous decade. It divided psychologists during the 1970s. Noam Chomsky was among those that saw the fallacy and triviality in Herrnstein's thinking. In an essay titled "Psychology and Ideology" Chomsky (1972b) accused Herrnstein of grounding his conclusions in what Herrnstein himself was discouraging: an ideology that was serving specific needs of a stratified society (Chomsky, 1972a, 1972b). In his own words:

> There is, however, an ideological element in his argument that is absolutely critical to it. Consider the second step, that is, the claim that IQ is a factor in attaining reward and that this must be so for society to function effectively. Herrnstein recognises that his argument will collapse if, indeed, society can be organised in accordance with the socialist dictum, "From each according to his ability, to each according to his needs." His argument would not apply in a society in which "income (economic, social, and political) is unaffected by success." (Chomsky, 1972b, p. 34)

In fact, Chomsky went on to state:

> If we look more carefully at what history and experience show, we find that if free exercise is permitted to the combination of ruthlessness, cunning, and whatever other qualities provide "success" in competitive societies, then those who have these qualities will rise to the top and will use their wealth and power to preserve and extend the privileges they attain. They will also construct ideologies to demonstrate that this result is only fair and just. We also find, contrary to capitalist ideology and behaviorist doctrine (of the nontautological variety), that many people often do not act solely, or even primarily, so as to achieve material gain, or even so as to maximize applause. (Chomsky, 1972b, p. 36)

Chomsky appears to be positioned closely to Fox (1956) and M. Young (1958) on the subtle role of ideologies and, particularly, the meritocratic ideology justifying an unjust social order. More importantly, he questioned the conception of academic knowledge, arguing how academic work that is often associated with objectivity, can also be value-led and ideological. In the same years, Leon Kamin's accusation of data fraud in IQ tests by Cyril Burt was storming across the Atlantic, putting into question the legitimacy of Burt's work for the following decades (Mackintosh, 1995).

An advanced society as a merit society

The U.S. sociologist and theorist of the postindustrial society, Daniel Bell, also noted issues related to Herrnstein's arguments. In *The Coming of Post-Industrial Society*, Bell (1976) argued for a new definition of meritocracy, recognising the original meaning of the word and its link to intelligence and intelligence testing. However, he challenged the negative connotation attributed by Fox (1956) and M. Young (1958) and argued for a positive and just meritocracy as characteristic of the postindustrial society. Bell (1976) transformed meritocracy into a synonym of social mobility with a *positive* connotation. According to Bell, the principle of merit and achievement underpinned a productive and efficient society. As Bell comments:

> The post-industrial society, in its initial logic, is a meritocracy. Differential status and differential income are based on technical skills and higher education. Without those achievements one cannot fulfil the requirements of the new social division of labor which is a feature of that society. And there are few high places open without those skills. To that extent, the post-industrial society differs from society at the turn of the twentieth century. (p. 409)

Meritocracy was considered by the U.S. sociologist necessary for the efficient functioning of the postindustrial society, and education as the means of climbing the social ladder. Meritocracy was the society of the just, not of the equals. In fact, while we should guarantee some kind of equality by respecting everyone, independently of their origins or group, we should also allocate unequal praise justly on the basis of different achievements (Bell, 1976).

Meritocracy at the workplace

The debates on meritocracy that saw multiple parties discussing its meanings and consequences as justification for inequality and just social order were silenced with the first psychological operationalisations of meritocracy. Perhaps it is unsurprising, given its association with the division of labour, that when meritocracy was psychologised, it occurred first in the *organisational* psychology literature. In fact, the earliest empirical study retrieved by a search for "meritocracy" on the APA database PsychInfo, examined administrative bureaucracies in Belgium (Bacharach & Aiken, 1979). In this study, department heads and subordinates were asked about their levels of job satisfaction (1 = very dissatisfied; 4 = very satisfied) and "the organisational commitment to use merit criteria for promotions" (p. 862). Promotion criteria that were based on results of written exams, individuals' potential, and work performance were considered as an indication of reliance on merit. Responses were coded from 0 (no reliance on merit) to 4 (sole reliance on merit). With this, the authors conceptualised merit as an objective notion. Bacharach and Aiken (1979) argued that a meritocratic stress on efficiency, meritocratic competition among workers, and the meritocratic objectification of working criteria would result in more worker dissatisfaction. Accordingly, they predicted lower satisfaction among employees who perceived the organisation to rely highly on meritocracy. However, to the researchers' surprise, the workers were more satisfied with their work,

their superiors, and their salary to the extent that they believed merit was stressed in promotions criteria. In other words, workers conceptualised meritocratic criteria surprisingly positively.

Around the same time, social psychologist Morton Deutsch theorised meritocracy as a socialised ideology, a conceptualisation that might explain Bacharach and Aiken's hypothesis and their surprising results. According to Deutsch (1979), individuals in fact are socialised into the belief that meritocratic allocation is just, natural, and fair since when they receive grades at school, where the allocation of high grades justifies the principle of allocation in the economic system, impeding co-operative learning and accommodating socioeconomic inequalities (Deutsch, 1979, 1983). In fact, "having a shortage of merit when there is a shortage of good positions helps to avoid difficult decisions" (Deutsch, 1979, p. 394).

Meritocracy was also operationalised for the first time as a *belief* in research on gender inequality in promotion at work. One of the most persistent ways that psychologists operationalise constructs is by developing measures of beliefs and attitudes. As Danziger (1997) noted, the concept of attitude and the notion of ideology are linked. *Attitude* and attitude measurement imagine a distinction between surface opinion and underlying mentality, and whilst the concept of the "social attitude" was not originally conceived as something measurable, it is the attitudes that social psychologists repeatedly measure that determine the conceptualisation of what "attitudes" really are. In contrast, the concept of ideology assumes both coherence and contradiction between beliefs that are connected to social conditions. As such, attitude is a seemingly morally neutral word, removed from social context, whilst ideology has more obvious moral and historical connotations that also imply the falsity of a seemingly coherent truth (Danziger, 1997).

Interest in gender roles and stereotypes experienced a boom in U.S. psychological research in the late 1970s (Eagly et al., 2012). The idea that academia was a fair meritocracy, organised by objective standards, was considered a defence against women's accusations of gender-based discrimination in that context (Laws, 1975). In social psychological research on gender, meritocracy was operationalised using a specific wording (belief and attitude) that allowed authors to bypass its ideological meanings. C. J. Young et al. (1980) investigated what Laws (1975) defined as *token* women in academia: women who were a minority in an academic setting and who were psychologically adapted to this situation. C. J. Young et al. (1980) explored "whether faculty women could be distinguished into clusters with distinctly different psychological adaptations to their marginality" (p. 511) using their newly created "Academic system *beliefs* scale." This scale included three sets of statements which Laws (1975), had argued to be characteristic beliefs of *token* women. The first set referred to beliefs in the university as a meritocracy (e.g., "*Male and female faculty members are equally likely to be allowed to teach higher level courses in their specialty field*."). The second and third sets referred to resistance to preferential treatment for women and beliefs in the "dangers" to men of reverse discrimination. C. J. Young et al. also measured women's awareness of sex discrimination and they registered whether their survey respondents belonged to a feminist group or not.

Thus, C. J. Young et al.'s (1980) scale measured meritocracy as part of a system of beliefs held by some individual academic women, not a systemic ideology that was

serving specific needs. The same academic system *beliefs* scale was later on used by Reid (1987), where the notion of ideology does not appear once.

However measured, meritocracy could be regarded as an ideal system with equal opportunities for all (that women did not enjoy yet in academia or other workplaces), or serving as an ideological justification that academia was meritocratic, which allowed discrimination to persevere. C. J. Young et al. (1980) and Reid (1987) showed that both such belief systems existed among American academics at this time, without the need to locate their own beliefs in this ideological debate.

Meritocracy as an ideal social system: The rise of inequality and the political exploitation

Although inequality reduced substantially during the three decades before the 1980s due to the social and political changes that followed the Great Depression and two World Wars, the 1980s saw a U-turn towards rising income inequality (Piketty, 2020). Except for the countries already suffering high levels of inequality due to their colonial past, in the 1980s, income and wealth inequalities started to rise in every region of the world, and they did so very dramatically in the United States. In the meantime, economic growth continued to slow down.

Meritocracy fit perfectly with the individualistic principle and became the ideology used by politicians to explain the unequal distribution of income, wealth, and success. In fact, as highlighted by Jo Littler (2013), the early 1980s witnessed the emergence of neoliberalism within which meritocracy was central to the proliferation of how an "ideal society" should work. Margaret Thatcher in the UK and Ronald Reagan in the United States—both inspired by the Milton Friedman school (Ebenstein, 2007)—appealed to individual choice and aspiration to explain success and failures in individual life outcomes. For example, on the 28th of February, 1983, in an interview for *The Sun* newspaper, Margaret Thatcher (1983) stated:

> it doesn't matter what your background is. I believe in merit, I belong to meritocracy, and I don't care two hoots what your background is. What I am concerned with is whatever your background, you have a chance to climb to the top. (para. 44)

Thatcher was aligned with Bell's concept of meritocracy as a vehicle for social mobility and equality of opportunity. In the same fashion, in the United States, meritocracy was assimilated as a synonym of the American dream with its emphasis on the individual: no matter where you come from, if you work hard enough you can achieve success (McNamee & Miller, 2009), an ideal that is part of the Protestant Work Ethic (Furnham, 1984). Therefore, the political meritocratic rhetoric was focused on the theme of equality of opportunity, with outcomes differing from individuals primarily according to their levels of effort and abilities. The meritocratic individualisation of life outcomes hidden in the rhetoric of social mobility (see Bell, 1976) was instrumentally moving people's attention away from the social order and the wider welfare context. Differently from Herrnstein's more overt discriminatory rhetoric, according to neoliberal leaders, there were no inherent differences among people except for those determined by the proper

state of societies, so that anybody who had merit could rise to the top. This politicisation and positive connotation attributed to the term meritocracy went ahead during the 1990s and was also used for policy making and propaganda (Themelis, 2008) in the British Labour Party.

The psychological crossroad: Meritocracy as a hierarchy-legitimising ideology and a justice principle

Not only did the political use of meritocracy change in the 1980s and 1990s, but also its psychological construction. It was in the 1990s, with the end of the Cold War, that psychologists started to conceptualise meritocracy as a broader social system (Helwig, 1998; Mitchell et al., 1993) and to measure it as a system of principled beliefs (Davey et al., 1999; Pratto et al., 1994). Psychologists began to operationalise meritocracy both as a hierarchy-legitimising myth and as a justice principle. These works created a new line of research that developed in parallel to the hereditarian argument, creating a further irony between what the concept of meritocracy was originally coined to say about psychological measurement and the legitimisation of inequality through seemingly value-neutral and objective measurement of individuals' merits.

In the 1990s, hereditarian views on meritocratic social stratification remained influential in psychology, but were not discussed nor challenged within the psychological literature that was psychologising meritocracy. In 1994, Herrnstein and Murray published *The Bell Curve: Intelligence and Class Structure in American Life*. In this book, the authors renewed the argument in favour of an IQ-based social stratification relating intelligence and race and showing data to support an argument that cognitive abilities shape social status and affect a wide range of social behaviours. The book, that brought Michael Young's dystopia to the extreme, had a strong influence on both sociological and psychological literatures and opened a long debate that remained detached from the rest of the psychological literature on meritocracy. For example, the data used by Herrnstein and Murray were reanalysed by Berkeley's sociologists (Fischer et al., 1996) to refute the original authors' claims. The American Psychological Association (APA) organised a task force to produce a report (Neisser et al., 1996) that summarised other psychological perspectives on intelligence and showed that many questions on the reliability of measurements and findings were still unanswered.

Social psychologists studied meritocracy as a broader social system, relying on a wide variety of constructions of meritocracy side-stepping the ongoing debate about the ideological base of meritocracy, individual differences, and social stratification. For example, Mitchell et al. (1993) manipulated meritocracy using different levels (low vs. medium vs. high) to which income depended on individual effort and ability. These authors studied meritocracy in relation to distributive justice, which is concerned with how resources are allocated, and the trade-off between social equality and economic efficiency. Despite the authors arguing for an ideological divide between the principle of equality and efficiency, they stated that "the bitter policy battles between liberals and conservatives in the real world spilled into the laboratory" (p. 636). This wording is particularly emblematic when taking into consideration how the ideological views that were affecting some

psychological theorising on meritocracy (e.g., Herrnstein) were silenced in empirical psychological work. Not only participants, but theorists and empiricists could as well be affected by ideological beliefs. In one study with child participants, Helwig (1998) classified meritocracy as a nondemocratic government. The author introduced children to meritocracy as a type of government where the 100 cleverest people ruled. Among children, the meritocratic system was considered as the least fair and the least preferred after the democratic options and only before oligarchy. Neither Mitchell et al.'s (1993) nor Helwig's (1998) work mentioned the psychological debate that was taking place on individual differences, abilities, and social stratification.

The most enduring measurement that was critical of meritocracy as a belief system emerged in early works on social dominance. In 1994, Felicia Pratto et al. published an individual-differences measure of Social Dominance Orientation (SDO), described as a preference for group-based dominance that predicted support for hierarchy-legitimising ideologies. In this paper, and for the first time in the psychological literature, meritocracy was operationalised explicitly as a hierarchy-legitimising myth, a set of ideals that legitimises differential worth of people and inequality within a social system. According to Pratto et al. (1994) meritocracy was an ideology involving three different "hierarchy legitimizing" components: (a) the Protestant work ethic, which emphasises the importance of hard work and effort to achieve fulfilment; (b) the belief in a just world, that is, the belief that the world is a fair place and everyone gets what they deserve; and (c) equal opportunities, a concept already presented in Bell (1976), Rawls (1971), and in the feminist psychology literature on meritocracy (e.g., C. J. Young et al., 1980). Supporting the belief that everyone already had equal opportunities resulted in the belief that those who did not succeed must not have deserved success as they must not have put in enough effort and hard work to obtain it. This concept of equality of opportunity was far from that of Rawls (1971), according to which equalising opportunities meant compensating for those who had less. In Pratto et al. (1994), neither the Protestant Work Ethic Scale nor the belief in a just world correlated positively with SDO scores consistently across samples. However, the Equal Opportunity Scale was found to be consistently correlated with SDO across the samples. Higher SDO participants endorsed items such as: "*In America, every person has an equal chance to rise up and prosper*," "*Lower wages for women and ethnic minorities simply reflect lower skill and education levels*," and "*America is the 'land of opportunity'*." This was the first empirical study in psychology that problematised and measured meritocracy as a larger set of ideological beliefs whilst reframing meritocracy as an individual-difference measurement.

Meritocracy was at the same time operationalised as a justice principle in the 1990s. Davey et al. (1999) developed the Preference for the Merit Principle Scale, which measured meritocracy in terms of the equity principle of distributive justice. Deutsch (1975) described three different distributive rules that can be followed, depending on the goal of the situation. *Equity*, which is followed when goods and rewards are distributed in proportion to individuals' input, is said to be preferred when the goal is to encourage efficiency and productivity in the economic interaction. *Equality*, which is followed when every person is allocated the same quantity of goods and rewards, is the dominant principle when the goal is maintaining pleasurable social relationships. *Need*, which is

followed when goods and rewards are distributed according to people's needs, is adopted when the system fosters the individual's development and welfare (Deutsch, 1975).

Davey et al.'s (1999) preference for the merit principle scale consisted of 15 items aimed at measuring people's preference of allocating outcomes on the principle of equity. This scale was closely related to Deutsch's principle of equity and it included items that echoed the Protestant work ethic (e.g., "*In life people ought to get what they deserve*") and belief in a just world (e.g., "*The effort a worker puts into a job ought to be reflected in the size of a raise they deserve*"). However, as opposed to those scales, they were more focused on prescriptive beliefs (e.g., how things should go) rather than descriptive ones (e.g., how things go), a distinction that would be studied later on by Son Hing et al. (2011). Framing meritocracy as preference for the merit principle revealed a negative correlation with sexism and did not show any correlation with SDO, RWA (Right-Wing Authoritarianism), conservatism, and racism.

Meritocracy as a value-free construct

Pratto et al. (1994) and Davey et al.'s (1999) recontextualisation of meritocracy created new psychological measurements and discussions around meritocracy in social psychology.

As explained in the introduction, from 2000 onwards, meritocracy was conceptualised as a social phenomenon that was inevitably part of the world, thus objectifiable through measurement. However, this emphasis on measurement failed to recognise the ideological ground of the study of this concept and the historical and cultural roots of the related theorising. Furthermore, it divorced the study of meritocracy from its value-laden and ideological origins, silencing social psychological debates and critique of meritocracy. For example, Michael Young is hardly cited within the psychological literature, and the few works (e.g., Autin et al., 2015) that touched on *The Rise of the Meritocracy* highlight the irony of meritocracy (e.g., Kuppens et al., 2018) but did not mention the role of psychological measurement in legitimising this system nor the psychological debate on the definition of meritocracy. As Bingham and Jackson (2021) recently commented: "have critiques of meritocracy been sequestered to academic research?" (p. 21); continuing,

> We are reminded here of well-intentioned, critically minded University colleagues who, while carrying out strong theoretical and practical work in social justice education . . . want to attract the best and the brightest . . . . Ironically, the metric by which these . . . are gauged too often turns out to be a meritocratic metric. (pp. 22–23)

The social psychological literature on meritocracy marries this logic. It seems that we have been too busy demonstrating through measurement how meritocracy exists and how it works, and with this we bought into and obscured the possibility of critiquing the system of measuring others and suggesting alternatives to it. This development of the field has two consequences. First, it leaves in place the implicit assumption of meritocracy and intelligence testing about the objectivity of psychological measurement and its consequences for the social structure. Second, it is a missed opportunity for social

psychologists to recognise and argue around the ways in which our work and practices maintain the status quo (e.g., Adams et al., 2015).

Conclusions

The history of meritocracy shows that the psychological conceptualisations and measurement of meritocracy occurred in the middle of an interdisciplinary debate involving social scientists, sociologists, and psychologists on the meaning of the concept itself, its consequences, and its relationships to social inequality and justice. This history clashes with the ideal of value-free, transhistorical objective measurement for psychology (e.g., Cherry, 1995). Instead, it shows how psychological constructs are socially, contextually, and historically dependent (Danziger, 1997; Gergen, 1973). Together, the psychological impetus of measurement left behind the critique to meritocracy and a proactive effort to offer new systems of values. In this, the origin of meritocracy and its history urge an interdisciplinary approach that also takes into consideration the ideological debate around it and its history. Otherwise, the objectivity suggested by psychological conceptualisations and operationalisations might serve specific ideological needs.

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