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Globalisation of Institutions of Modernity: On Meritocracy

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Abstract: The research subject is meritocracy, as one of the most significant (post)modern institutions of society in global coordinates. The research problem is expressed by questions about the characteristics of meritocracy: What is meritocracy? Why does it arise? How does meritocracy benefit us in modern society? The scientific goals are: a) description of the characteristics of meritocracy, its strengths, weaknesses, opportunities and risks; b) understanding the historical context of the emergence of meritocracy, i.e. its causes; c) generic scientific explanation of the causes of meritocracy; d) functionalist scientific explanation of the utility of meritocracy; f) scientific prediction of the importance of expanding the definition of meritocracy for a more precise and comprehensive understanding of this phenomenon and its implications in the future. The methods of descriptive and comparative analysis, deduction, synthesis, induction and desk research will be used, as well as case studies of the institution of meritocracy, along with the indispensable historical-comparative method, in order to reach qualitative data during 'research in the library' on bibliographic units from the abstracted sample. The results of the research relate to the answers to the initial research questions, as well as to the answers to the strengths, weaknesses, opportunities

and risks of meritocracy. A significant research result is the discovery of the paradox of meritocracy: 1) that it conflicts with the basic postulates of capitalism (inherited property rights) and 2) that it tends to create a knowledge economy and society, which will increase stratification and the effect of inheritance, because better jobs will become available only to well-off families and their descendants. Meritocracy holds that a society that does not motivate and reward achievement cannot increase wealth and well-being, and thus becomes inefficient and dysfunctional. It is proposed to expand the definition of meritocracy by all considered effects (effect of luck, effect of environment and effect of acquired experience in the environment, i.e. in the social field): practice [(habitus x capital) + field] + experience gained in practice = meritocracy.

Keywords: global institutions, knowledge economy, meritocracy, meritocracy paradox, Al.

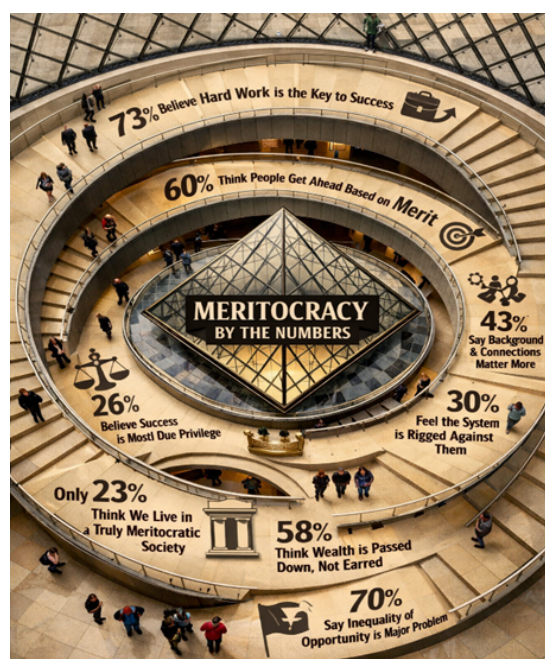
Introduction

This paper thematises the phenomenon of meritocracy through answers to research questions that concern the pre-modern (What?) and (post)modern (Why?/How?) epistemological search for the truth about (objective) reality, or the very reflection on what the truth could be: What is meritocracy? Who were its protagonists throughout history? Why does meritocracy arise? How does meritocracy benefit us in modern society?

Popular culture at the world level inherits the idea of meritocracy, which is vividly depicted, or just imagined, as a scale whose levels, i.e. rungs, symbolize higher social statuses, i.e. positions (and the associated values of obedience, frugality and diligence) to which it is allowed and possible to succeed through independent efforts, i.e. thanks to individual endeavors and the used opportunity for climbing and overcoming the accompanying challenges, i.e. the anti-values of disobedience, greed and arrogance, laziness.

Figure 1

Figure on meritocracy statistics, spirally designed as a staircase in the Louvre Museum.



Source: Personal Chat GPT inquiry

Furthermore, in the literature, the idea of meritocracy is closely related to the idea of globalisation, since, according to one of the first originators of the discourse on globalisation, Anthony Giddens (1998), this process represents the expansion of the institutions of modernity at the world level. One such social institution is, precisely, meritocracy, in addition to the universally spread institutions of world capitalism, the international division of labour, the nation-state, and the military order.

Research Problem and focus

The research subject is meritocracy, one of the most significant (post)modern institutions of society on a global scale. Questions about the characteristics of meritocracy express the research problem: *What is meritocracy? Why does it arise? How does meritocracy benefit us in modern society?*

Research Aim and Questions

Questions about the characteristics of meritocracy express the research problem: What is meritocracy? Why does it arise? How does meritocracy benefit us in modern society? The scientific goals are: a) description of the characteristics of meritocracy, its strengths, weaknesses, opportunities and risks; b) understanding the historical context of the emergence of meritocracy, i.e. its causes; c) generic scientific explanation of the causes of meritocracy; d) functionalist scientific explanation of the utility of meritocracy; f) scientific prediction of the importance of expanding the definition of meritocracy for a more precise and comprehensive understanding of this phenomenon and its implications in the future.

Literature review/Theoretical Overview

Globalisation and meritocracy

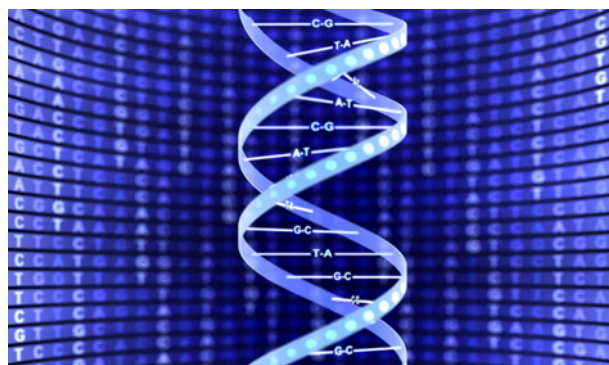
The relationship between globalization and meritocracy is reflected in their connection based on the expansion of ideas, things, consciousness, people, social relations and institutions around the world, which is the basic meaning of the concept of globalization (Steger, 2005), whose three basic qualities, according to the same author - global connectivity (e.g. via the Internet), mobility (e.g. for business, forced or touristic reasons), and imagination, as awareness of the world as a unique whole (e.g. through the concept of world citizenship, i.e. cosmopolitanism) (Center for Advanced Studies - Eurac Research, 2021).

Thus, globalisation enabled the development of societies, on a global level, through management via expert systems. Enlightenment order and science owe a lot to this control of society, thanks to the profiling, i.e. formation, differentiation and selection of personnel from various professions who should adequately shape social positions in the service of people in need. Otherwise, it would be impossible to imagine a high school student managing a city without the necessary qualifications, i.e. a high professional degree to perform complex tasks, or a gynecologist managing a water supply system instead of taking care of women's reproductive health and well-being.

If it were not for meritocracy, and state investment in human capital, for the continuous increase of knowledge, there would not have been numerous discoveries that forever changed not only the fate of society, but also of humanity, and possibly the existing civilization, such as one of the most significant discoveries of the 20th century - the discovery of the double strand of deoxyribonucleic acid (DNA) in 1953. Two scientists from the University of Cambridge, Francis Crick and James Watson, are responsible for the discovery, who later received the Nobel Prize for Medicine because their epoch-making discovery contributed to the understanding of genetics, the development of new vaccines and treatment methods, and the prevention of various diseases, and offences thanks to the possibility of DNA detection of criminals.

Figure 2

The double helix of DNA



Source: <https://www.thoughtco.com/double-helix-373302>

Thus, they contributed to the new momentum of biotechnology even to the level of therapeutic cloning of embryonic cells (Radio Free Europe, 2004) for their differentiation into stem cells which, when transplanted back into the human body, can prevent mortality caused by a large number of hereditary diseases, such as diabetes, Parkinson's disease, paraplegia, heart attack and in the future, probably, other supposedly 'incurable diseases'.

This discovery would not have been possible without the exclusive meritocracy that reigns at the world's leading universities, such as Cambridge, Harvard, the Massachusetts Institute of Technology, and the like, where enrollment quotas are filled by a strict selection of candidates, and the prestige of the faculty is determined by the number of closed study doors for many rejected students. Thanks to the meritocratic principles of the functioning of these educational subsystems around the world, it is known who the leaders are in the production of knowledge, PhDs and a specific habitus that is kept in shape by conducting scientific and professional everyday life at expensive scientific gatherings and in the highly efficient production of scientific and professional works on numerous issues of research.

Therefore, it is obvious that a good and highly functional society is unthinkable without a vertical and horizontal social structure, including the elite, which manages the society towards the set goals. Therefore, the question arises of the prerequisites for good social functioning, namely the manager's habitus. In other words, who deserves power, institutional power and authority in society and in the state? Should one's social power and wealth be a reflection of one's merits? Should the

trust to manage complex organisational systems be given to people without merit? What is the progressive ideal that every good society should strive towards?

Thoughtfully designing the image of the best elite, as an exclusive group of selected individuals with the best indicators of work in their field, will be helped not only by the historical meritocratic ideas of the liberal thinkers of the 19th century, but also by the philosophers of ancient Greece, statesmen of Rome, mandarins from China and humanistic enlighteners of the Renaissance and all to contemporary thinkers on this topic.

History of social thought about meritocracy

The history of classical and then contemporary social thought about meritocracy should lead to answers to the question: Why does meritocracy arise, as an idea and a practice?

The etymological origin of the term meritocracy indicates that it is a coinage of the ancient Greek word for rule, power, strength (κράτος) and the Latin word (mereō), which means merit, earning, value, effect. Thus, loosely translated, meritocracy means the rule of the deserving, worthy. In other words, it is the idea that social influence is acquired thanks to merit, that is, that managers should be meritorious persons, which would achieve a fair distribution of social positions, roles and resources.

Merit or meritum is a term used to denote value, quality, virtue, excellence and the like. From merits come their outcomes, which are sometimes used as evidence of merit. For example, the Nobel Prize in Literature is strong evidence that Ivo Andric is a worthy writer and artist. However, sometimes the external outcome is not decisive regarding the moral quality of the person and his motives that produced it. Some desirable qualities cannot be measured on standardised tests. Thus, a degree from Harvard Medical School is not enough to make someone a good doctor.

Hence, some thinkers point to the problem of meritocracy's meaning. Thus, the Nobel laureate Amartya Sen somewhat undermines the clarity of meritocracy as a concept, despite all its virtues. Also, David Miller believes that the meaning of the term meritocracy is not exactly clear, which is why this term cannot really be used as an ideal type with which reality would be compared.

The roots of theoretical reflections on meritocracy go back to ancient times, to the Greeks, although the idea of ensuring that elites consist of intelligent, hardworking, moral, well-educated persons was a constant concern of thinkers not only within the Western philosophical tradition but also throughout the history of mankind. Ancient ideas about meritocracy led us to the first theorists of the rule of the best. Their ideas emerged in Athens, during the 4th century BC, at a time when the three most common forms of government in Greek city-states (tyranny, oligarchy, and democracy) had discredited themselves. Tyrants were fickle and destructive, prey to their own passions; the oligarchs were selfish and incapable of commanding the people's obedience; democratic government was held by fools, driven by material desires. Major political thinkers of the 4th century, including Plato, Aristotle, Isocrates, and Xenophon, sought ways to improve political regimes by infusing virtue (or human excellence, including practical wisdom) into the leadership class. The basic tool for this reform was supposed to be a new form of education, oriented towards virtue and transforming the souls of future leaders.

Plato's meritocratic political theory (found primarily in the *Laws*, *Republic*, and *Statesman*) is similarly focused on governance. His argument for meritocracy and against democracy is simple - it is difficult to manage a country. This requires specific skills, such as courage, sobriety, kindness and love of wisdom. These skills are not found among ordinary people or the rich. If they were entrusted with political power, the 'ship of state' would run aground due to the quarrels of the democratically elected leaders. In contrast, a 'true pilot'—the philosopher king—could safely guide his ship to its destination.

Aristotle differs in that his concern (in *Nicomachean Ethics* and *Politics*) is the distribution of social goods in general, not just political functions. Justice is giving people what they deserve, and that happens when they are rewarded in proportion to their merits. What Aristotle wants to equalise are the relations of merit and reward between persons. For example, suppose there are 100 units of a good to be divided among 3 people. Persons A and B are equally deserving; C is twice as deserving as they are. Justice is achieved by giving 25 units of good to A, 25 units to B and 50 units to C. It should be remembered that equal distribution is fair only in the special case where all recipients are equally valuable. When the majority of flute players are equal in their art, there is no reason why those born in better-off families should get better flutes. A superior instrument should be reserved for one who is a superior artist.

The Roman contribution to Western meritocracy was more practical than theoretical. Their governing principles emphasised the experience of things and the moral standing (*dignitas*) of the leaders rather than Plato's quest for philosophical enlightenment. All Roman citizens were guaranteed equality before the law, but political leadership required participation in competition to serve the state. Elections were often corrupt, but in Roman eyes, they were vastly superior to the sorting practice used in the Greek democracies. When they were not corrupt, elections produced candidates who combined competence, a good reputation, and popular support.

In the Eastern philosophical tradition, one can cite the ancient Chinese thought of Confucius and the Mohists, who believed that the elevation of the worthy was necessary for utilitarian reasons. The basic ideas of this tradition are found in Confucius, Mencius and Sunzi. The practice of meritocracy during the Chinese Han dynasty, 200 years before Christ, through the so-called Mandarin system, which emphasised that government officials should be highly educated, was particularly emphasised. On that occasion, difficult, multi-day exams for civil servants were organised in line with Confucian ideals (brotherhood, kindness and respect) to provide a basis for recruiting staff to maintain a successful state and social system. In short, the purpose of government is to promote the welfare and virtues of the people. This requires political power to be based on virtue and talent. Political leaders, who would deservedly reach the highest positions in society, would serve as role models and wise decision-makers, and the meritocratic system of government would contribute to the creation of hierarchies, which would reflect the naturally given inequalities among people, so that there would not be confusion among them if they were positioned in the same positions. Thus, the most famous achievement of the Eastern meritocratic tradition was the Imperial Trials. Until then, entry into the state bureaucracy was largely controlled by nepotism and aristocratic influence, with no openness to giving political power to competent and virtuous people, even if they came from the lower class. The imperial examinations somewhat replaced that path to power with

an impartial, rigorous examination, which was open to the public. Although such exams were abolished at the beginning of the 20th century, similar civil service exams have proliferated and are used around the world today (including in China). In the 17th century, the concept of meritocracy spread from China to India, under the colonial administration of Great Britain, and then to continental Europe.

Meritocratic ideas are also found in Islamic philosophy and are compatible with divinely revealed Islamic law (Sharia). For example, Al-Farabi sought a political system that would bring happiness and perfection to the people living within it. The ruler needs to be a hybrid philosopher-king and prophet-imam, with qualifications drawn from Platonic and Islamic thought, and an elaborate hierarchy between citizens. Similar ideas can be found in the works of Ibn Sina, Ibn Baj and Ibn Rushd.

Meritocratic thinking was revived in the Renaissance by the founder of Christian humanism, Francesco Petrarch, who tried to combine Greek theory and Roman practice. He was convinced that the leadership of the church and state in his time was deeply corrupt. To address the moral depravity of his time, he created a long-term plan to reform Christendom by restoring ancient virtues and wisdom. The plan was implemented by his followers, who created the humanities as a tool to improve the moral quality of the elites. The humanities included the study of language and eloquence, history, poetry, and moral philosophy. Therefore, Petrarch argued that merit—understood as a virtue—is a prerequisite for the legitimate exercise of political power. A meritocratic state is justified, stable and functional because it is responsible for instilling virtue in its citizens, so that they are deserving enough to participate in government. For this, among other things, a public literacy program is needed. Political institutions should be constructed so that only deserving citizens (educated, experienced, virtuous, ...) can be elected as judges and senators, and that rich and powerful families cannot corrupt the political process. The Renaissance movement to revive classical antiquity established the premise that government is illegitimate if exercised by men and women without good character and a good education in classical literature. The message of the humanist movement to non-elite citizens was that virtue and education opened the way for them to rise in society, while nobles were warned that their titles were worthless if they lacked 'true nobility', i.e., virtue, learning, and a spirit of devotion to the state.

Meritocracy was an important value for the Enlightenment movement as well. It tended to view people as individuals, not as undifferentiated members of a group, sharing similarities. Article VI of the Declaration on the Rights of Man and Citizen (1789) also speaks of this distinction: 'All citizens, being equal before the law, have equal rights to all dignities, public positions and occupations, according to their abilities and without distinction except for virtues and talents.'

Edmund Burke, in his *Reflections on the Revolution in France*, recognised that the greatest challenge of any aristocracy was to get the common people to accept its authority. The French nobility's failure to retain the support of the common people was the main reason for the collapse of the Old Regime in 1789. According to Burke, the British, unlike the French, managed to implant a market society into a feudal system of ranks and privileges. For Burke, the solution to oppression is not personal autonomy or the egalitarian breaking of the social order, but the formation of certain

moral attitudes by superiors and inferiors. Those moral attitudes are the product of 'liberal manners' and 'enlarged views' that accepted the unequal distribution of property and status as necessary for the common good and social harmony. Napoleon Bonaparte's slogan 'careers are open to talents' was also remembered, and he himself partially attributed his success to the meritocratic character of his rule.

The most famous meritocratic proposal was given by John Stuart Mill. He proposed the so-called weighted or plural voting, in which the votes of more deserving individuals would be worth more. In accordance with the general right to vote, all people would have the right to vote, but some people would have the right to more than one vote, because they are more deserving than other people, since they were more educated for highly skilled occupations or professions, compared to individuals who perform work that does not require special knowledge and skills.

Table 1

Mill's proposal for plural voting

Plural voting	
Occupation/Profession	Number of proposed votes
Unskilled workers	1 vote
Qualified workers	2 votes
Trainees and work supervisors	3 votes
Farmers, producers and traders	3-4 votes
Professionals (e.g. lawyers, doctors, priests, writers, artists, public officials):	5-6 votes
University graduates and members of 'learned societies'	at least as many votes as professionals

One of the founders of the United States of America, and its president, Thomas Jefferson, wanted the American nation to be characterised by a government of 'natural aristocracy', in which hierarchies would reflect 'virtue and talents', but not 'wealth and origin'. The USA is also associated with the meritocratic ideal of justice, better known as the American dream, which was explained by the creator of this term, James Adams, not only as a dream of high salaries and cars, but as a dream of a social order in which every man and every woman will be able to attain the greatest growth of which they are capable, and by which they will be recognised by other men, regardless of the accidental circumstances of birth or position. In the USA, the idea of meritocracy was promoted after the assassination of President James Garfield in 1881, when the practice of appointing government jobs based on qualifications rather than political connections or family ties was introduced.

Despite the considerable history of meritocracy thought, it is often held that the term meritocracy first appeared in the works of Gene Flood's *Sociology and Education*, Alan Fox's *Class and Equality*, and Paul Lamartine Yeats' *Fairer Actions*, and was used by these English authors in a negatively connoted way.

However, the creator of the term meritocracy is most often considered to be the British sociologist and Labor politician Michael Young, who used it for the first time in 1958 in his satirical and dystopian novel *The Rise of the Meritocracy 1880 - 2033*, starting from the idea of meritocracy, the roots of which go back to the 19th century, when there was a democratic movement in Great Britain and America to abolish nepotism and employ civil servants based on their achievement in exams. Young expressed the theory of meritocracy succinctly with the formula: $IQ + effort = value$. He presented the distortion of British society by the fact that it is governed by an elite who were elected to those privileged positions through intelligence tests that usually assess only logical-mathematical intelligence, not other types of multiple intelligences. The elite elected in this way governs the mass of intellectually less gifted and dissatisfied citizens. The Tripartite education system of the United Kingdom, which existed from 1945 to 1970, is satirised. Within this system, pupils were assigned to one of three types of schools based on test results at the end of a specific educational period. High test scores directed students, mostly middle-class, to more prestigious schools, while less prestigious schools remained for students from the working class. The state invested significantly in prestigious schools, and the students of those schools were encouraged to continue their education at colleges.

All of this was resisted by left-wing political parties, whereas conservative political options provided support. Thus, Young described the system of the United Kingdom, within which intelligence and merit were favoured, and that, over time, this order would produce mass discontent in society, culminating in rebellion and the rejection of the rule of the best. Thus, he identified meritocracy as a trend in post-war British society that threatened to extract the leaders of the insurgent working class into an artificial elite, which would one day establish a new system of oppression even worse than the traditional British class system against which the working class had fought.

Research Methodology

General Background

This is a qualitative, desk-based conceptual study of the last 10–15 years on core debates, plus classics, around the keywords of meritocracy, globalisation, sustainable development and AI. The sources were thematically analysed by conceptual and historical tracing.

The methods of descriptive and comparative analysis, deduction, synthesis, induction and desk research will be used, as well as a case study of the institution of meritocracy, along with the indispensable historical-comparative method, in order to reach qualitative data during 'research in the library' on bibliographic units from the abstracted sample.

This case study relies on SWOT analysis, which is suitable for analysing the institution of meritocracy because meritocracy simultaneously functions as a normative ideal, an institutional practice, and an ideological framework. SWOT precisely allows those three dimensions to be separated and systematically looked at – without taking a 'for' or 'against' position in advance.

Analytical limits of the case study are that the results of one single case study are difficult to apply to other institutions or countries. The interpretation of strengths and weaknesses depends on

the researcher and the institutions, which change faster than the study lasts. SWOT can be informative but difficult to measure. Local specificities limit wider application. It is difficult to prove direct cause-and-effect in the practice of meritocracy.

Sample

Sample consists of references from the social sciences, especially sociology, on the theme of meritocracy and its impact within the global constellation of institutions. References are selected for their meritocracy-related keywords, such as modernity, globalisation, sustainable development, and AI, from the previous 10–15 years, especially the last 5 years. Some of them are sociological classics supplemented by contemporary debates on meritocracy and its characteristics.

Instrument and Procedures

This is not quantitative research, so there is no instrument that is needed for the research to be released. The methods of descriptive and comparative analysis, deduction, synthesis, induction and desk research will be used, as well as case studies of the institution of meritocracy, along with the indispensable historical-comparative method, in order to reach qualitative data during 'research in the library' on bibliographic units from the abstracted sample. The research was conducted through a qualitative analysis of analytical notes, created during a systematic reading of scientific literature, whereby the notes were treated as primary data and subjected to the procedures of coding, comparative analysis and theoretical synthesis and interpretation, and the result was not a literature review but a qualitative interpretation of discourse and knowledge.

The first step was the collection of a corpus of references, that is, scientific papers relevant to the research and research questions, based on the criteria of disciplinary affiliation, thematic relevance and time frame, as well as theoretical orientation, which will be considered an interpretative field. In the second step, reading served as an analytical practice to create notes in the form of isolated terms and definitions, short summaries of arguments, quotations with contextual comments, and spontaneous analytical observations, treating the notes as primary qualitative data rather than auxiliary material. In the third step, a preliminary selection and reduction of notes was performed in accordance with open coding, in which notes that contained interpretation, contradiction or theoretical tension were retained. Then, the notes were coded and grouped by key concepts, argument type, and the author's theoretical position. So deductive codes were created because they stemmed from the theoretical framework, andrelat, after that, inductive codes from notes were also created, which were later compared by bringing them to one another. Finally, the codes are grouped into broader categories to formulate theoretical insights and record one's interpretive positions for theoretical synthesis.

Data Analysis

The data of this qualitative research is all that carries meaning, enabling the understanding of institutions, experiences, interpretations, practices, and social processes from the author's perspective. As verbal (linguistic) data, research notes created during the reading of abstracted references are used.

Results

The results of the research relate to the answers to the initial research questions, as well as to the strengths, weaknesses, opportunities, and risks of meritocracy.

A significant research result is the discovery of the paradox of meritocracy:

1) that it conflicts with the basic postulates of capitalism (inherited property rights) and

2) that it tends to create a knowledge economy and society, which will increase stratification and the effect of inheritance, because better jobs will become available only to well-off families and their descendants.

Meritocracy holds that a society that does not motivate and reward achievement cannot increase wealth and well-being, and thus becomes inefficient and dysfunctional. It is proposed to expand the definition of meritocracy by all considered effects (effect of luck, effect of environment and effect of acquired experience in the environment, i.e. in the social field): $\text{practice} [(\text{habitus} \times \text{capital}) + \text{field}]] + \text{experience gained in practice} = \text{meritocracy}$.

Discussion

Evaluation of the concept of meritocracy

Adrian Wooldridge (2021) believes that meritocracy is just a modern name for a very old political ideal of aristocracy, i.e. the rule of the best. Most people in the contemporary world understand 'aristocracy' as hereditary nobility, rather than nobility by virtue. Namely, Thomas Jefferson used the term 'aristocracy' to denote 'natural aristocracy', an elite of people of virtue and ability, rather than the corrupt, hereditary aristocracy of old Europe. In the Western tradition, meritocracy is more often the type of excellence to which any form of government, whether monarchy, republic, or democracy, can aspire. In modern times, competitive meritocratic principles have spread from the domain of government, i.e. management in general, to other social spheres and the types of social institutions belonging to them. Therefore, the meaning of improving the moral and intellectual quality of the elite has been established for the concept of meritocracy.

Adrian Wooldridge's book is considered the first general history of the meritocratic ideal in Western civilization. Wooldridge claims that meritocracy and the triumph of meritocratic principles in the modern West, since the 18th century, have been the main drivers of the emergence of the modern world, alongside political freedom, scientific innovation, and the free market. Proponents of meritocracy were considered the organisers of the Protestant Reformation movement, whose goal was to challenge the feudal and nepotistic forms of socio-political power of pre-modern societies, where status, wealth and political power were considered the hereditary prerogatives of certain families and classes of people. Therefore, inherited privileges were considered the enemy of both the American and French Revolutions, since the proponents and initiators of both revolutions saw a natural aristocracy, based on talent and energy, as the rightful successor of the Old Regime of Monarchy. Therefore, even in Max Weber's classical theoretical thought (Dillon, 2014) we can find elements of the meritocratic formula, since Weber in his work 'The Protestant Ethic and the Spirit of Capitalism' from 1905 (Weber, 2001; Weber, 2002; Ghosh, 2014) interpreted that Protestant

theology (Gane, 2002), and especially 'Calvinist religious doctrine' (Stolley, 2005: 38), created socio-psychological, and primarily material, conditions for the emergence and rise of capitalism in the countries of Western Europe and the USA- in, since the focus of the Protestant work ethic was placed on hard work and asceticism which will consequently result in the accumulation of wealth, i.e. private property, which is the driver of capitalism. Therefore, modern meritocracy was a democratic movement that sought to open Western social, economic and political institutions to talented persons, regardless of their (social) origin, gender or race, which is why social mobility was the reason for the existence of that movement. Wooldridge is convinced of the benign influence of meritocracy in the contemporary world and considers it the triumph of ability over undeserved privileges and the transition from traditional prerogatives, based on hereditary ownership of land, to more effective leadership, based on intellectual capacity and hard work. The right to rule, under the old regime, was based on descent, while in the contemporary world of wealth, freedom and scientific innovation, it can only be based on intelligence tests, competitive exams and performance reviews.

On the other hand, for Michel Sendel (2021), meritocracy is a negatively connoted concept. It is linked to Western societies, followed by the myth that these societies are the promised paradise for achieving success, that is, the so-called. The American dream. Meritocracy, in its ideological core, creates a disparity between the successful and the unsuccessful, causing divisions that disintegrate and disorganise society due to the absence of striving for the common good. Meritocracy pleads for individual mobility, i.e., advancement on the social ladder regardless of origin (ethnic, class, racial) and based on talent, resourcefulness, education, work, effort, and similar virtues. This idea is thus directly opposed to the majority of existing social systems throughout history, from slave-owning, real-socialist to totalitarian, which are all examples of closed, rigid type societies. Nevertheless, Sendel problematizes it for the reason that meritocracy appears more like a dead letter on paper, more a proclamation than a practical realization, and for the reason that it has turned into a new form of hereditary aristocracy, which gives priority to the children of the rich, since the 20% of the richest in the world have their wealth is passed from generation to generation. In addition, the population is polarised according to the criterion of more and less valuable members of society, that is, those who succeeded and those who did not (winners and losers), while the question of the absence of financial (state) support for those who, however, do not lack, is not raised. effort, if they already lack luck and family support. The successful look down on the unsuccessful, while the unsuccessful strive for a rebellious revenge against those who take credit for themselves and do not consider the unsuccessful their equals. He even interprets the rise of right-wing populism worldwide not only as a consequence of globalisation and the migrant crisis, but also as a consequence of internal divisions stemming from meritocracy in Western Europe and America. Brexit and the victory of Donald Trump in 2016, according to him, are only the result of the aforementioned effects of meritocracy, that is, the revenge of the humiliated.

Joe Liter (2017) also follows Sendel's reasoning because he values meritocracy as a key cultural means of legitimising contemporary neoliberal culture that promises opportunities while at the same time creating new forms of social divisions given the non-negligible racial, class and gender status, whose role cannot be ignored. Therefore, meritocracy is seen as an ideology, although it does not

have the suffix -ism, which legitimises the status quo, that is, the existing system of socio-economic inequalities, in order to explain why people belong where they are positioned on the social scale of stratification.

And that the role of chance, fate or luck, i.e. unforeseen circumstances that are often beyond our control (e.g. hereditary disease, disability, etc.) cannot be left out, as claimed by another critic of meritocracy, Robert Frank (2016), who considers that the realization of one's success, in addition to all the talent and hard work invested, still depends more on the lucky factor, i.e. favorable circumstances, which further mythologizes the concept of meritocracy. According to him, luck is the most important factor in success in the current social circumstances dominated by the neoliberal market concept, "winner takes it all". Using the example of Bill Gates, he points out that there are programmers in the world who are almost as skilled as Bill Gates, but who, nevertheless, did not succeed in becoming the richest person in the world, or at least one of them, because in the circumstances of the competitive market game, many have merit, but few of them succeeds, so luck is the decisive factor that separates and differentiates them.

Table 2

SWOT analysis of meritocracy

Strengths	Weaknesses
Positive selection according to clear criteria, qualifications, measurable results	Disparity between successful and unsuccessful
Social mobility regardless of heritage, origin, gender or race	A means of legitimizing socio-economic inequalities
The assumption of an open and democratic society against the majority of closed socio-economic formations throughout history	Unattainable ideal (more proclamation than practical realization)
Promotion of science, knowledge, expertise and work	Elitism and 'meritocratic arrogance'
Opportunities	Threats (risks)
Development of society and progress based on expert systems and work ethics	Establishment of hereditary oligarchy and nepotism of the richest in the world
Building the knowledge economy and society	Rebellion and/or revolution of the losers of the meritocratic race
Promotion and implementation of sustainable, inclusive and smart development of society	Disintegration and/or disorganization of society after the suspension of meritocratic principles of organization of society and social subsystems
Positive state intervention (through education, subsidies, etc.) in the structural sources of discrimination of marginalized social groups	Imposing a 'dictatorship of the proletariat'

Therefore, meritocracy has both its advantages and disadvantages. However, the opportunities it provides, in the context of current trends and obligations to achieve sustainable development around the world, are much greater and more likely than the risks that meritocracy shares with other forms of governance (primarily democracy), which is why stands out among them

as the least bad form, which was once claimed, by Aristotle, for a democracy which, in the postmodern age of the dominance of artificial intelligence (which can manage human behavior with its algorithms, e.g. by sending people advertisements for the purchase of goods and services according taste preferences that she previously collected from them), gradually dies, that is, begins to lose the function it once had in practice, thus becoming a non-function.

Nevertheless, in addition to the potential meritocracy brings, its realisation in practice is hindered by a paradox that accompanies it. Namely, critical evaluators of the idea and practice of meritocracy, as a principle of distribution, acting from blatantly capitalist positions of defending the concept of private property and market exchange, enable us to see that this market exchange could not even take place without property rights, and thus the idea of inheritance (which contradicts the idea of meritocracy), which the state should guarantee. Although meritocracy arose on the ruins of the feudal order of hereditary privileges in Europe, the fact is that without the idea and existence of property rights, i.e. inheritance, it could not function in practice because it is achieved through market competition. This is precisely where the paradox of meritocracy is reflected, among other things.

The results of the research relate to the answers to the initial research questions, as well as to the strengths, weaknesses, opportunities, and risks of meritocracy. A significant research result is the discovery of the paradox of meritocracy: 1) that it conflicts with the basic postulates of capitalism (inherited property rights) and 2) that it tends to create a knowledge economy and society, which will increase stratification and the effect of inheritance, because better jobs will become available only to well-off families and their descendants. Meritocracy holds that a society that does not motivate and reward achievement cannot increase wealth and well-being, and thus becomes inefficient and dysfunctional. It is proposed to expand the definition of meritocracy by all considered effects (effect of luck, effect of environment and effect of acquired experience in the environment, i.e. in the social field): $\text{practice} [(\text{habitus} \times \text{capital}) + \text{field}] + \text{experience gained in practice} = \text{meritocracy}$.

Meritocracy and sustainable development: The aporia of meritocracy

Bringing it into relation with the current concept of sustainable development shows that meritocracy is a difficult problem to solve, a complicated, hopeless issue. However, even without bringing it into connection with the concept of sustainable development, it is possible to state that meritocracy in itself is a kind of aporia because it reflects an antagonistic relationship between natural endowments (talents, inheritance, etc.) or even necessity (e.g. disability, stigma, discrimination) and free will, expressed through individual effort, commitment and work.

Although meritocracy creates the mentioned mental and social divisions, it still has an undoubted importance for the establishment of non-existent and maintenance of existing expert systems, without which the functioning of modern complex societies on a global level is unthinkable, as well as solving pressing issues of the survival of humanity, such as global problems of an ecological nature. Moreover, in order to become an expert, who uses knowledge, skills and experience to discover problems and the best approach to the problem in order to solve it as efficiently as possible, all the elements on which the simple definition of meritocracy is based are

needed - from intelligence to effort and hard work, in the amount of 10,000 hours, which is equivalent to a five-year working experience in a social activity, and which was also confirmed by the results of scientific research from the nineties of the 20th century, revealing that top violinists devoted 10,000 hours to practicing their skills at the music academy (HR World, 2021). In the business world, an example from practice often stands out: Bill Gates spent 10,000 hours programming before he founded Microsoft.

For societies to be sustainable in accordance with the global requirements of the international struggle for environmental protection, they should strive not only for sustainable but also for inclusive and smart development, which is the most important thing.

What does that mean? That means it is necessary to strive for an economy and society of knowledge that increases the need for more educated workers, equipped with knowledge and skills, even for professions that will emerge in the future, for which they were not educated at the time. Their employment will reduce unemployment and thus poverty. Overall, there will be a greater chance for them to choose higher-quality jobs with higher income value.

On the other hand, it can increase stratification and strengthen the effect of inheritance, because better jobs in the knowledge economy will increasingly become available only to those with a good family background, i.e., habitus, expressed primarily through family resources, in order to educate their closest ones. This will lead to the closing of the previously liberalised approach to education into a neoliberal concept of elitist higher education, which not everyone will be able to afford, but only rich families and their children, who will directly affect the quality of education through concrete demand for the desired educational services. This is already the second paradox of meritocracy - the intention to create a knowledge society and economy.

Not only does the concept of meritocracy conflict with the basic postulates of capitalism (inherited property rights) (the first paradox of meritocracy), but also with the socialist idea of the 20th century about the equality of social outcomes, i.e. of results, according to which everyone should contribute to society as much as he can, and receive from it as much as he needs (each according to his ability, to each according to his needs). This raises the question of the justification or non-justification of higher resource consumption in certain cases (e.g., necessity that does not depend on our will or desire that we can influence) to reach the same level of well-being. Thus, some individuals and/or groups can try and work harder than others but not be rewarded for it, which leads to their demotivation due to the feeling that they are being taken advantage of by those who work less, in accordance with the motto: 'They cannot pay me as little as I can work'. A good example of motivating some and demotivating others is raising the price of income for unqualified and qualified workers, but not for highly qualified workers, because by raising the job complexity coefficients of the previous two categories, or even by equalizing them, they approach the job complexity coefficient of workers with a university degree, which would be justly and expectedly to increase their coefficients, too.

This has broader consequences: a society that does not motivate and reward achievement cannot increase wealth and well-being, and thus becomes inefficient and even dysfunctional. It is a

completely unsustainable strategy because it promotes laziness that destroys general social well-being, as there is no progress due to idleness and stagnation, which the idea of meritocracy resists.

Indian economist and Nobel laureate Amartya Sen (Sen, 1981; Sen, 2000) also wrote about the importance of state aid for the development of meritocracy, suggesting that the state should help individuals develop their capacities to realise their potential, which is possible through education, subsidies, and the like. It is the idea of investing in the development of people so that they can perform their social roles, that is, existing social functions, as well as possible, and so that they themselves can provide the desired level of well-being. The state should provide education, that is, the opportunity for people to improve throughout their lives, and the right to social insurance, social and health care, etc., so that they can increase their productivity and thus realise their potential in the market. In particular, marginalised and discriminated groups, such as women, youth, and ethnic minorities, should be subsidised in order to enable them to access better-paid and better-quality jobs. This means a balance of personal responsibility and state assistance through positive intervention in the structural sources of discrimination, to increase the willingness of certain categories to participate in market competition.

In accordance with all previously considered, it is reasonable to expand the definition of meritocracy to all considered effects (effect of luck, effect of environment and effect of acquired experience in the environment, i.e. in the social field). The most common type of social field an individual encounters today is the market itself, which is known to us thanks to Bourdieu's theory of practice (Bourdieu, 1977; Grenfell, 2008), and which can be expressed in a short formula.

$$(\text{habitus} \times \text{capital}) + \text{field} = \text{practice}$$

Implemented on the idea and practice of meritocracy, Bourdieu's theory of practice would thus contribute to a new definition of meritocracy for a more precise and comprehensive understanding of this phenomenon and its implications in the future, which would read as follows:

$$\textbf{practice + experience gained in practice = meritocracy}$$

Finally, the idea of meritocracy promotes the sustainable idea of the great dependence of the quality of life on personal qualities (talents, and their equivalent coefficient of multiple intelligence, i.e. habitus) and the effect of the environment, i.e. life circumstances (eg. from family material and non-material support, state aid, cosmic conditions, etc.), and from the effect of one's own experience, i.e. own responsibilities (effort, work, persistence, etc.) on the life path, all of which make a human individual unrepeatable even with the existence of the potential possibility of its cloning, which would be likely at the level of genetic potential but not at the level of the effect of environment and experience.

Conclusions and Implications

This research offered some, but not final, answers to the initial research questions: What is meritocracy? Who were its protagonists throughout history? Why does meritocracy arise? How does meritocracy benefit us in contemporary society?

What is meritocracy? Meritocracy is the idea of positioning the deserving in their respective social positions. It refers to a form of social and state organisation in which the main organisational principle is merit, that is, the socio-educational success of individuals based on the types of intelligence and the individual efforts required to realise them (smartness). Meritocracy implies the advancement of people in society based on their abilities, thanks to education that is liberalised and democratised to the extent that it is available to everyone interested in attending it for the purpose of self-actualisation, that is, the development and improvement of their talents.

Why does meritocracy arise? The history of classical and then contemporary social thought about meritocracy led to answers to the question: Why does meritocracy arise, as an idea and a practice? That history also presented the ardent proponents of meritocracy, from the philosophers of ancient Greece, the politicians of Rome, the mandarins of China, and the humanist educators of the Renaissance, through liberal thinkers of the 19th century, all the way to contemporary positions on this topic. In contemporary times, competitive meritocratic principles have spread from the domain of government or management in general, including the rule of itself, to other social spheres and the social institutions belonging to them. Therefore, the meaning of improving the moral and intellectual quality of the elite has been established for the concept of meritocracy. Since the 18th century, meritocracy and the triumph of meritocratic principles in the modern West have been the main drivers of the emergence of the modern world, alongside political freedom, scientific innovation and the free market. Therefore, modern meritocracy was a democratic movement that sought to open Western social, economic and political institutions to talented persons, regardless of their (social) origin, gender or race, which is why social mobility was the reason for the existence of that movement. Meritocracy is thus directly opposed to most existing social systems throughout history, from slave-owning societies to real-socialist and totalitarian ones, all of which are examples of closed, rigid societies.

How does meritocracy benefit us in modern society? It is known that globalisation enabled the development of societies on a global level through management by expert systems. Enlightenment order and science owe a lot to this control of society, thanks to the profiling, i.e., the formation, differentiation, and selection of personnel from various professions who should adequately shape social positions in the service of people in need. Therefore, it is obvious that a good and highly functional society is unthinkable without a vertical and horizontal social structure, including the elite, which manages the society towards the set goals. Therefore, the question arises of the prerequisites for good social functioning, that is, the management habitus. If it were not for meritocracy and state investment in human capital, there wouldn't have been numerous discoveries that forever changed not only the fate of society but also humanity and possibly existing civilisations as well.

Some advantages speak for themselves about the importance of meritocracy: positive selection according to clear criteria, qualifications, and measurable results; social mobility regardless

of heritage, origin, gender, or race; an open and democratic society, as opposed to most closed socio-economic formations throughout history; and the promotion of science, knowledge, expertise, and work. In addition, it provides the following opportunities: Development of society and progress based on expert systems and work ethics; building an economy and knowledge society; promotion and implementation of sustainable, inclusive and smart development of society; positive state intervention (through education, subsidies, etc.) in the structural sources of discrimination of marginalised social groups.

Therefore, meritocracy has both its advantages and disadvantages. However, the opportunities it provides, in the context of current trends and obligations to achieve sustainable development around the world, are much greater and more likely than the risks that meritocracy shares with other forms of governance (primarily democracy), which is why it stands out among them as the least bad form, which was once claimed, by Aristotle, for a democracy which, in the postmodern age of the dominance of artificial intelligence (which can manage human behavior with its algorithms, e.g. by sending people advertisements for the purchase of goods and services according to taste preferences that it previously collected from them), gradually dies, that is, begins to lose the function it once had in practice, thus becoming a non-function.

Bringing it into relation with the current concept of sustainable development shows that meritocracy is a difficult problem to solve, a complicated, hopeless issue. However, even without bringing it into connection with the concept of sustainable development, it is possible to state that meritocracy in itself is a kind of aporia because it reflects an antagonistic relationship between natural endowments (talents, inheritance, etc.) or even necessity (e.g. disability, stigma, discrimination) and free will, expressed through individual effort, commitment and work. Although meritocracy arose on the ruins of the feudal order of hereditary privileges in Europe, the fact is that without the idea and existence of property rights, i.e. inheritance, it could not function in practice because it is achieved through market competition. Precisely in this, among other things, the paradox of meritocracy is reflected - the concept of meritocracy conflicts with the basic postulates of capitalism (inherited property rights) (the first paradox of meritocracy).

Although meritocracy creates the mentioned mental and social divisions, it still has an undoubted importance for the establishment of non-existent and maintenance of existing expert systems, without which the functioning of modern complex societies on a global level is unthinkable, as well as solving pressing issues of the survival of humanity, such as global problems of an ecological nature.

For societies to be sustainable in accordance with the global requirements of the international struggle for environmental protection, they should strive not only for sustainable but also for inclusive and smart development, which is the most important. On the other hand, it can increase stratification and strengthen the effect of inheritance, because better jobs in the knowledge economy will increasingly become available only to those with a good family background, i.e., habitus, expressed primarily through family resources, in order to educate their closest ones. This will lead to the closing of the previously liberalised approach to education into a neoliberal concept of elitist higher education, which not everyone will be able to afford, but only rich families and their

children, who will directly affect the quality of education through concrete demand for the desired educational services. This is already the second paradox of meritocracy - the intention to create a knowledge society and economy.

A society that does not motivate and reward achievements cannot increase wealth and well-being and thus becomes inefficient and even dysfunctional. It is a completely unsustainable strategy because it promotes laziness that destroys general social well-being, as there is no progress due to idleness and stagnation, which the idea of meritocracy resists.

It is reasonable to expand the definition of meritocracy to all considered effects (effect of luck, effect of environment and effect of experience gained in the environment, i.e. in the social field):
practice [(habitus x capital) + field] + experience gained in practice = meritocracy.

Finally, the idea of meritocracy promotes the sustainable idea of the great dependence of the quality of life on personal qualities (talents, and their equivalent coefficient of multiple intelligence, i.e. habitus) and the effect of the environment, i.e. life circumstances (e.g. from family material and non-material support, state aid, cosmic conditions, etc.), and from the effect of one's own experience, i.e. own responsibilities (effort, work, persistence, etc.) on the life path, all of which make a human individual unrepeatable even with the existence of the potential possibility of its cloning, which would be likely at the level of genetic potential but not at the level of the effect of environment and experience.

In the era of postmodern relativism and radical egalitarian claims, the idea of meritocracy is resurfacing, as it holds the potential for fairness and efficiency. It is based on the paradoxical logic of striving for equality, but also inequality. Meritocracy extends inequality among individuals in terms of their talent, while at the same time advocating equal chances to succeed in society based on that talent, provided there are guarantors of social mobility within the hierarchical scale of occupations or professions. Thus, the idea of meritocracy is one of social openness and prosperity, achieved as a consequence of achievements measured by universal and objective criteria. The only discrimination related to meritocracy is positive selection for the purpose of allocating the labour force, after the market has sorted through competition. However, the amount and types of capital that individuals have, according to their family status, i.e., socio-political and economic (lack of) prosperity, which prevents them from developing their potential, should also be taken into account. This would help understand the position of the underprivileged social strata, which, over the last thirty years, were most often labelled as losers of globalisation or just of transition, post-socialist transformation, when workers were left without jobs in factories as a result of the privatisation process. Their lack of education and capital was interpreted as an inability to navigate the market due to unemployment and the absence of their value. However, their anger most often escalated in response to electoral changes.

Given that meritocracy is largely absent in the world today due to the dominance of partitocracy, it should rightly be emphasised that only a society organised on meritocratic principles can survive natural entropy, a consequence of the uncontrolled spirit of egalitarianism.

Suggestions for Future Research: AI AND MERITOCRACY

Some future research could address the research question: Is artificial intelligence a reproduction of elitism or a correction of structural inequalities?

Ideally speaking, AI should be the perfect meritocratic judge who evaluates people based on knowledge, ability, and efficiency, without regard to gender, origin, class, accent, or appearance. At the same time, AI should also eliminate prejudices in employment, education and promotion.

However, in reality, AI reproduces structural inequalities as it operates and learns from historical data. The failures of individuals are usually interpreted as their own fault, but not as the consequence of structural limitations that should be questioned (Atakisi, 2025). For example, when recruitment algorithms favour profiles similar to those already employed, and 'potential' rating systems penalise non-standard career paths, while AI in education rewards cultural and social capital rather than 'pure talent'. So, meritocracy often turns into an ideological mechanism of social exclusion, even in fields presented as progressive and inclusive, such as the sphere of climate justice (Hunjan, Gay-Antaki, 2024).

This brings us to the myth of objectivity and the new technocratic elite, since meritocracy and AI often create opaque criteria under the pretence that 'an algorithm decided so'. Meritocracy is not a neutral or objective category; it is highly culturally and institutionally defined and constructed (Demirbilek, 2023). In addition, a technocratic elite is created that controls the parameters. There is also a depolitization of inequality because the problem is not society but 'insufficient score'. All of this plays into Michael Sandel's thesis about the moral arrogance of AI-enhanced meritocracy.

More and more people are talking about a post-meritocratic regime where AI serves for optimisation rather than justice, population management, and the selection of 'worthy' and 'those who are not', which translates the value of an individual into a set of metrics. However, it is important to note that meritocracy functions as a social contract, whose erosion weakens social cohesion and civic loyalty (Kline, Galeotti, & Orsini, 2025).

To reconcile meritocracy and AI, it is necessary to ensure the existence of conditions for algorithmic transparency, democratic control of criteria, the inclusion of sociological variables (class, context, life risks), the right to appeal and human correction. Without it, AI does not advance meritocracy; it legitimises and cements it.

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