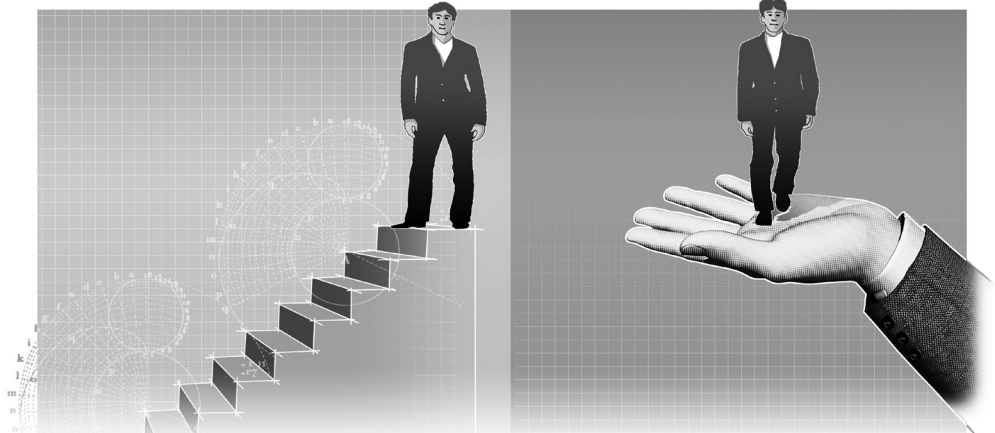


ESSAYS

DOI: <http://dx.doi.org/10.1590/S0034-759020140108>

MERITOCRACY AND BRAZILIAN SOCIETY



DOWN WITH MERITOCRACY

“Down with meritocracy” is a frequent sentence in posters displaying demands from different professional categories on strike and other union demands in Brazil. So, it is far from being new. What is interesting, in the present moment, is that this demand – “down with meritocracy” – is reproduced simultaneously with a Brazilian party-political, administrative and institutional discourse change, which wants to promote exactly what this demand wants to extinguish. The current and frequent references to meritocracy in government authorities, politicians and entrepreneurs speeches, invoking the need to “implant meritocracy” (commonly adopted expression.), in different spheres of Brazilian society, illustrate this change. This speech transformation is followed by countless organizations, public or private, medium and large-sized, whose high administrations have assigned, since the middle of the first decade of the 21st century, their Human Resource (HR) and/or Organizational Development (OD) areas, the job of “implanting meritocracy” in work environments. This is ironic, because the majority of these organizations already have performance assessment systems, one of the most used tools that measure and acknowledge merit, with promotions, wage increases and bonus as compensations. If we consider ‘assess’ as ascribe value, merit, to the results obtained, what does the expression “implant meritocracy” actually mean? What factors are at the root of this political, administrative and entrepreneurial speech change and the pressure for institutional ‘implementation of meritocracy’?

In this opportunity, I intend to explore what is behind this demand for meritocracy in Brazilian organizations, both private and public, in direct or indirect administrations, and the speeches structured around its implementation.

The qualitative material used in this analysis comes from my experience as meritocracy theme researcher for over a decade. During this whole period, I have had frequent contacts with HR and OD professionals, carried out focal groups with different hierarchical levels employees (including directorship and high management) and individual interviews, have examined institutional material and analyzed administrative policies relative to performance assessment.

LÍVIA BARBOSA

Researcher at Pontifícia Universidade Católica do Rio de Janeiro and Director of Socius Consultoria Ltda. – Rio de Janeiro – RJ, Brazil

Based on this set of data, I have limited my analysis to what I call “institutional meritocracy”, that is, the celebrated principle in modern organizations, according to which, admission, mobility and professional ascension of employees should be based on their performance in tasks assigned to them in the organizations. This logic is founded in the idea that, based on selection criteria, whose rules are previously set and known by all participants, like the requirement of a specific qualification, creates an initial equalitarian situation that ensures equal opportunities to all in that circumstance. Differences that might result from this initial moment are interpreted as consequence of the set of skills and talents of each employee, measured by means of performance assessment systems, like theoretical and practical tests, curriculum analysis, and interview, among others.

In these terms, wider historical, conceptual and sociological aspects of meritocracy in Brazil will not be analyzed, nor will the moral foundations of individual merit, as explored in works by contemporary philosophers like John Rawls, Ronald Dworkin, Amy Gutmann, among others. The way meritocracy is approached in Brazilian academic world as compared to other countries will also be outside this scope.

Speeches on meritocracy in Brazil

Historically, meritocracy practice and ideology have never been a demand by Brazilian society. While many European countries and USA were free from their spoil systems (public positions and functions distribution systems by politicians and election winner parties to fellows and friends), yet in the 19th century, due to social pressure, or even before, as consequence of revolutions that have abolished existing privilege systems, as occurred in France; among us, meritocracy came to be and is a formal and eventual criterion permanently disputing with nepotism, patronage and corporate privi-

leges. Expressions and euphemisms like “president’s share minister”, “reciprocity politics”, “technical position or ministry”, “it is in giving that we receive”, “QI (who appoints)”, “enter through the window”, “friends of the king”, “hanger-on”, “affiliate”, among others, are often used in political, organizational and daily conversations to illustrate logics and practices of staffing and promotion of positions and functions which is believed to prevail among us, both in public and private organizations, and which sound, at least in speech level, condemnatory.

In this context, what does the task proposed by countless organizations to HR and to OD, to implant meritocracy or meritocracy and accountability culture mean?

It means to admit that, though there are performance assessment systems, people suppose that meritocracy does not exist. In other words, their principles are not legitimate, according to some, in organizational practices. In case they were, there would be no need to demand its implantation.

This implantation proposal also suggests that meritocracy is something external to the organization, something that must be brought from outside, not inherent to Brazilian organizational tissue. From that the need to ‘adopt/implant a meritocratic culture’, as it is often mentioned. But how does it work in practice?

To the high administration, meritocracy implantation is the envisaged solution to increase organizational results and survive in the market.

It is a matter of strategy, rather than values. The way to “get there” is to clearly establish and firmly demand how much each employee ‘delivers’, based on what was previously agreed with their superiors and align individual results with the organization strategic planning. In this meritocracy implantation process, the performance assessment system reformulation is fundamental, and two aspects are central. First, to create more objective and measurable

goals. Second, make the articulation between work performed and its contribution to the organization final result clearer.

The cost of meritocracy, understood as the amount and quality of employees response to this change as related to results delivered, is a factor that concerns the high administration, mainly in public companies. The actual demand, accountability for the non-delivery of results and differentiation by means of individual performance acknowledgement interfere with Brazilian organizations comfort zone and with their relations with unions. In some companies, concepts like innovation and creativity are also associated to a meritocratic culture implantation. But, whatever the additions, meritocracy is seen as one key to face competition and globalization, levers behind its implantation proposal.

In HR and OD scope, the implantation of a meritocratic and accountability culture – terms that they all use carefully, due to their possible relations with ideas of guilt and punishment – is seen as a profound and complex process of “culture change”. It certainly is related to the ‘focus on result’, to the fact that managers assume their roles as chiefs and demand from their subordinate – a difficult task both in public organizations and private companies.

In the former, the variation of chief positions, due to political injunctions, make present chiefs fear the future, in case they assess negatively their current subordinates. Eventually, some of them may become chiefs. In the latter case, the weight of social relations makes it hard to demand, due to the value given to the organization atmosphere. And in both, the performance justification logic legitimates all and any result, taking from the accountability burden from employees’ shoulders. Reports by managers suggest that to affect the organization atmosphere means to affect their image of good managers and leaders, putting their own position at risk. To HR and OD, however, a cultural change is also re-

lated to the neutralization of paternalism; to the acknowledgement of those who ‘do’ rather than those who are “hanging on and those who don’t work; to the end of promotion per seniority, defended by unions, mainly in public organizations; to the end of substantive equality logic in the distribution of resources destined to promotion, which divides the amount in equal parts, without considering the rank; to the clear and constant feedback from employees; to the art of making objective result compatible without losing focus on skills and competences, among others. Independent of what meritocracy implantation implies, when it comes to organizational costs, however, both the high management and HR and OD consider it inevitable, because the country has been taken by a new competitive rhythm that doesn’t have place for the old work methods and poses a meritocratic logic that stimulates and acknowledges employees, rather than patronage and accommodation, with no individual accountability. Hence, meritocracy is seen by some as necessary for organizations survival. That’s why it came to be more than a speech; it became a demand from higher administration, which works as a pecking order, from the federal government to public organizations top brass, from them to their HR managers and to personnel. In private companies, the direction is the same: from the board of directors or owner/founder to HR and OD and then to personnel.

Another fact used as argument to the need of meritocracy implantation, is the need to retain new talents. According to OD and HR professionals, the famous millennium generation is not prone to accept the “old schemes”; they want challenges, they want to “see things happening”, and they want to be recognized.

In this organizational context that demands meritocracy from above, three speeches are structured among employees of different organizations, which I call ‘meritocratic’, ‘anti-meritocratic’ and ‘why now’?

They represent distinct positions in face of the high administration demand and are present in all organizations analyzed. The existing differences between public and private organization are related to emphasis on certain aspects and internal distribution of these speeches among the several organizational hierarchy segments, rather than substantive differences. While presenting such speeches, therefore, I will not make distinctions, attempting to focus on their basic characteristics.

Meritocratic speech

Meritocratic speech is minority in most organizations, which reflects a historical position of meritocracy in Brazilian society, where it is not an inclusive value. It is a critical speech of Brazilian ‘paternalist’ culture which, according to it, is perpetuated in organizations and promotes values that are contrary to meritocracy. Patronage, personal relations, lack of demand, QI (who appointed), nepotism, among others, are social practices used as illustrations for this paternalist character and their consequences. Though the meritocratic speech salute the high administration, HR and/or OD initiative, it does not rely on existing conditions and political will to actually implement a meritocratic practice, since those who intend to do so are permeated and influenced by these same practices.

They all recognize that no organization worldwide is totally meritocratic. Relationship capital, appointments, and organizational politics are present in all countries. The differences in Brazil are the frequency and quality of these situations, and the consequences that follow when expected results are frustrated. In other countries they are faced. The United States, England and even France are mentioned as meritocratic societies references, even with possible distortions. What those adept of the meritocratic speech indicate is the existing ‘lack of shame’ among us.

The core of meritocratic speech is the importance ascribed to acknowledgement of individual results. The non-acknowledgement or undue compensation, according to their adepts, generates dissatisfaction and lack of motivation; it leads to accommodation, promotes injustices and weakens demands and planning in organizations. In this speech, meritocracy is a stimulus, an instrument to do more and better. This stimulus is not only pecuniary, it is also symbolic. People feel compensate for their efforts and gratified for their public acknowledgement.

Those who defend meritocracy argue that the comfort zone generated by Brazilian paternalist culture, which does not demand results and does not institute palpable consequences for those who do not ‘deliver’ what was previously established, is a vicious circle that should be broken. Just as there is no good result without compensation, there is no bad result without consequence. For the later we do not necessarily mean punishment, which would be extreme, but management of people; use results to train and adapt people.

Another aspect criticized is the use of seniority as career advance mechanism, which allows that, no matter the results or efforts by each one, they all gain. The result is a discouraging picture. Why would anyone make more efforts than the minimum required? To demand, define consequences, set goals, are actions that impact on work relations, and the ‘Brazilian’ privileges “the good organizational atmosphere”, which is, in practice, ‘every man for himself and the organization for all’. For this group, assessing performance and ascribing merit are not technically problematic, since all know who does and who does not, who is competent and who is not. Having systems that appropriately measure what must be done is, therefore, fundamental, because it renders difficult accusations of injustices and inverse demands, from employees to managers, for the results. The meritocratic

speech always uses extreme and contrasting examples to defend their point, but admits the complexity of assessing several actual cases, mainly those defined by nuances rather than contrasts.

The competition, always argued by other groups as negative consequence of meritocracy, is not perceived in this way by meritocratic adepts. According to them, in fact it already exists, though implicitly. It does not break the “good work atmosphere”, because it has already happened. To work and not be acknowledged, and see a coworker being compensated ‘without having done anything’, equally wear down relationships.

Anti-meritocratic speech

The anti-meritocratic speech is characterized for considering meritocracy an external threat brought by neoliberalism, globalization, elites, among others. Besides being external, it is also a type of cultural imposition. The fact of existing and being adopted in other countries does not mean that it should be so here. If, in this context, this ‘other’ is negative, but becomes positive when they want to suggest that “meritocracy has problems or does not work in other countries”. It is seen as disaggregating of work environment, because it establishes competition where it didn’t exist. It is also mistaken because it exchanges quantity for quality. It is unfair, because acknowledges and compensates the work of all. In short, it is a new form of organizational exploration and stress. The anti-meritocratic speech claims for more benefits for all and considers each one daily work as a compensation for the salary. Meritocracy is an undue extra demand. Their adepts antagonize, therefore, any higher demand of results and employees performance.

The accountability of individual is almost always rejected, and the whole guilt from results falls on a variable outside the person, which varies from the direct management to the government of the moment,

all of them responsible for supplying the necessary instruments to do what must be done. Skills like proactivity, initiative, commitment, included in meritocratic and managers speech are absent. In their place, dedication and commitment are present, mainly among public or former state companies’ employees, time in the company, experience and others.

The anti-meritocratic speech is also antagonist to any innovation and organizational change proposal that implies alteration in status quo. “It won’t work”, “It’s not possible”, among others, are their mantra. The reason for this antagonism arises from the syndrome of “successive claims”. In order to any change occur and things get better, a series of previous transformations are required which, as they don’t happen, hinder suggested changes. Since many of these claims collide with difficulties that are beyond the possibility of solution by management or even by the organization, the speech ends up privileging the status quo, even when it explicitly criticizes it in an abstract and formal way.

The value emphasized by the anti-meritocratic speech is seniority, addressed as synonym to experience. Its valorization is understood as a form of acknowledgement by the company of the employee “dedication”, a poorly clear category, but containing ideas like “diligence and fulfilment of obligations”, without specifications. The big merit of seniority is its role in ensuring a career, its capacity to take the employee until the end, irrespective of his/her performance. Since the moment of admission in the organization, career is understood as an organizational promise, a vested right.

Anti-meritocratic speech adepts profess an isonomic logic: what is granted to one should be extended to all, and do not legitimate someone’s merit as deserving a differentiated acknowledgement, particularly if it represents pecuniary differences. For this reason, they support the equitable distribution of any additional sum destined

to reward a good performance. The motto is: a little for all is better than more for some.

Though being an extremely meritocracy critic and often invoking the opposition fair/unfair, it does not include, in this context, as part of their claims for justice and employees rights, the opposition to nepotism, corporate, relational and patronage practices that permeate Brazilian society and many of our organizations. On the contrary, they are not spontaneously mentioned, and when the adepts are questioned about them, they use the syndrome of successive claims to explain them.

“Why now?” speech

This speech is basically practiced by those whose priority is the maintenance of what they call “a good work environment”. It has more common points with the anti-meritocratic speech than with meritocratic speech, though their objectives are less explicitly political and claiming.

For these speech adepts, meritocracy would create a negative competition among people. Future demands, accountabilities and blamefulness would create open conflicts that would prejudice the good corporate environment and would affect productivity and good results.

Defenders of the “why now?” speech assume the idea that everybody works, are equally competent and dedicated, and therefore there is no reason to differentiate from each other. They often use expressions like “high performance teams” to justify their position regarding meritocracy. According to them, it does not respond to most common cases, the small performance differences between two people, instead, they only account for extreme and contrasting cases, examples most used by meritocratic speech.

If assessment systems do not allow a reliable definition of who makes more and better, how is it possible to reward one and not reward another, or both? How to hi-

erarchize? Similar to the anti-meritocratic speech, “why now” adepts would rather ensure “a little for all, and not for some, anymore”. What may sound demotivating, an injustice to meritocratic speech, to this speech sounds the opposite.

The basic values in the “why now?” speech are “social harmony” and “team work”, aspects that will be affected by established hierarchies based on performance. This speech does not intentionally seek social equality, but emphasizes personal relations primacy as a form of confirmation and intermediation of individual differences, which must be acknowledged and legitimated in face of the organization demands. Their adepts also argue in favor of seniority, “dedication” and “love to the company”, fundamental values that make people deserve acknowledgement, and therefore make them move in their careers. This speech defenders, as well as those from the anti-meritocratic speech, tolerate invasion of private life in organization life, but for different reasons.

As to anti-meritocratic adepts, it is a feeling of possession regarding the organization, mainly in public organizations. The company is more their possession than society’s or shareholders’. As to “why now?” adepts, the foundation is the moral bond maintained with the organization, based on a kind of “reciprocity law” that works in terms of debits and credits. Employees’ dedication is compensated by the understanding, on the organization part, of eventual facts that arise in daily life. However, in meritocratic speech, this same invasion arises as a Brazilian paternalism symptom, and, as such, a more rigid separation between private life and public world is claimed. Though many people who adopt this speech agree that goals and results should be defined and demanded, the demand admitted is very subtle. They are Strong critics of contemporary organizational stress, and meritocracy would be one instance of this stress, with significant references in the past. Examples

from a past time are always used to illustrate what should be done. They resent the current market rhythm and “growing organizational demands”. Any innovation is considered suspicious, which suggests a kind of fatigue regarding new management technologies, always promoting new changes, when the last one has just been adopted. From there the tone “one more” or “why now?”.

FINAL CONSIDERATIONS: IS MERITOCRACY HERE TO STAY?

Based on the demand for meritocracy implantation in Brazilian organizations and on the three speeches positions, which interpretations can we transmit regarding the meritocratic logic appropriation among us? Can we see in this speech change and in attempts of practical implementation, a step ahead concerning the consolidation of a meritocratic ideology in Brazilian organizations that will result in rupture of other hierarchy criteria that permeate them? Or does this new demand configure just an occasional strategy, a form of facing competition and globalization, as suggest the objective that high management ties to the meritocracy implantation? Or, is the tightening of this demand for meritocracy just another strategy for political accusations that usually come with elections, disappearing soon after?

The present picture, though suggestive, is not accompanied by an effective demand for meritocracy by society, nor by organizations internal public, quite the reverse. The sentence “down with meritocracy” itself, with which I have initiated this article, and the prevalence of anti-meritocracy and “why not” speeches within organizations suggest that. The voices of the streets, in June 2013, were neither consistently heard regarding the theme, and, after some months, they are silent. If we add to that an overview of our history, we will see that this adown demand is not new to us, Brazilian people. It has already happened in other

occasions. The introduction of meritocratic criteria, particularly in the public sphere, has always been a State concession to society, as in the case of public tenders, which was initially subject of Strong reaction within the government itself, among politicians and within organizations. And it was never a demand from society.

Later, these government-granted criteria have crystalized and started to cohabit other social hierarchic criteria, and the meritocratic logic that inspired them has not become the encompassing value within the State itself, and within organizations. So, it is probable that the possible changes following the current demands for meritocracy will be restricted to certain dimensions of organizations and will remain cohabiting other social hierarchy criteria inside them. The alleged need of more institutional meritocracy does not suggest the end of our spoil system, which, as is suggested, will keep on being active in organizations high management and in the public sphere.

And why, one might ask, does Brazilian society and organizations internal public develop more speeches that reject than demand meritocracy? Why, on one hand, is meritocracy ideology criticized and/or feared as something external and threatening to the organizational tissue and to society, but, on the other hand, the poor performance, the absence of accountability for results and privileges do not seem to cause damages? Aren’t they seen as withdrawing from citizenship and individual rights, and contradicting an equalitarian state which the anti-meritocratic and “why now?” speeches privilege? These are tough questions that deserve some pondering.

First, in Brazil, a type of similarity individualism prevails, as would say Simmel (1971), who rejects the construction of hierarchies that emphasize distinctions between people. It is precisely that that the meritocratic ideology aims to promote within organizations. After a supposed initial equalitarian state, given at the admission

moment to the different positions, another's result is not legitimated as source of hierarchy and as object of acknowledgement, even when measured by previously agreed criteria, known and established along the organizational life. The prevailing logic is isonomic, which claims "the same or more for all", irrespective of delivery differences. In this sense, the single hierarchy admitted is the one based on seniority, in which everybody can be included in case they remain in their position for enough time. In the same way, explicit competition is rejected, because this social mechanism supposedly emphasizes the difference among individuals in an environment expected to be equalitarian from beginning to end.

Second, in past and present Brazil, despite some changes observed, we still profess selective modernity and individualism. We want material results of efficiency, productivity, competitiveness, but, at the same time, we don't want their costs, particularly personal costs. We want equality, but we

accept multiple hierarchic logics when they benefit us. Meritocracy is a value that rejects organizational mobility resulting from criteria other than individual performance, as defined inside a specific institutional frame. That means impact on everyone's comfort zone, not just on some. It is precisely this selectivity that we are once again observing. We claim for meritocracy in some areas, but we don't face our spoil system and their privileges. Though organizations high administrations are prone to change public and private employees comfort zone, in favor of more results, there are no signs of transformations in their internal practices. Considering the extremely hierarchic, personalist, relational and non-transparent nature of management in Brazil, it seems that we want to keep the logic of combining modern and traditional systems. The use of non-meritocratic principles to staffing the board of directors and administration boards, the existence of careers with highly subjective advancement criteria which withdraw from

the individual his self-management capacity, the existence of 'feuds' and 'extensions' and the growth of a 'meritocratic nepotism' (a Brazilian type of degreeocracy, that justifies nomination of relatives based on their qualifications) are some instances that maculate the imaginary of what is intended to be implanted in the floor below.

In this context, the sour taste that comes along performance assessments results is not surprising.

REFERENCES

- Dworkin, R. (1977, November 10). Why Bakke has no case. *New York Review of Books*.
- Gutmann, A. (1980). *Liberal equality*. Cambridge: Cambridge University Press.
- Rwals, J. (2001). *Justice as fairness: a restatement*. Edited by E. Kelly. Cambridge: Harvard University Press.
- Simmel, G. O. (1971). Individuality and social forms. In D. Levine. Chicago: Chicago University Press.