

## Meritocracy: origins of the term and developments in the UK education system<sup>1</sup>

### *Meritocracia: origens do termo e desdobramentos no sistema educacional do Reino Unido*<sup>2 3 4</sup>

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#### Abstract

This article examines the emergence and use of the meritocracy concept and its developments in the English education system. It is a bibliographical research that aims to raise the discussions on the origins of the term “merit” in the work of British sociologist Michael Young *The Rise of the Meritocracy* (1958) and English education meritocracy-based reform in the second half of the twentieth century. We find in John Locke the source for understanding the reasons why the Modern Period values merit over heredity, and in the UK reform of Margaret Thatcher (1979-1990) we find the economist Milton Friedman as the main organic intellectual to justify the adoption of merit as a criterion in the current education system.

**Keywords:** meritocracy, teachers’ work, accountability, educational reforms

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## **Resumo**

*Este artigo examina o surgimento e uso do conceito meritocracia e os desdobramentos no sistema educacional inglês. Trata-se de uma pesquisa bibliográfica cujo objetivo é levantar as discussões sobre o mérito em termos de suas origens, na obra do sociólogo britânico Michael Young, *The Rise of the Meritocracy* (1958) e a experiência meritocrática na reforma da educação inglesa na segunda metade do século XX. Encontramos em John Locke a fonte para entender as razões pelas quais o período moderno valoriza o mérito em detrimento da hereditariedade, e na reforma realizada no Reino Unido por Margaret Thatcher (1979-1990) encontramos o economista Milton Friedman como principal intelectual orgânico a fundamentar a adoção do mérito como critério no sistema educacional contemporâneo.*

**Palavras-chave:** meritocracia, trabalho docente, responsabilização, reformas educacionais

## **Introduction**

In this article we aim to investigate the term meritocracy, aspects of its history, and the main intellectuals that defended it as a possible criteria for the educational system. We conducted a bibliographic research to contribute with the discussions, as the conceptualization of the term, in its semantic sense, perspective, and connection with education has not been dealt with in Brazilian studies. Thus, we aim to raise the main references on meritocracy from the work of Michael Young, *The Rise of the Meritocracy*, written in 1958. Then, we recover the meritocratic base on John Locke's thought and advance to the literature on the reforms of English education which started in the late 19<sup>th</sup> century, mainly focusing on those that influenced the reforms on the second half of the 20<sup>th</sup> century. They give us answers and raise new questions on the objective of the research, that is: to understand the origins of the term meritocracy and its unfoldings to English education. We also point out that the theme is current as the terminology and the reform models inspired by it have crossed the boundaries of the United Kingdom through the following decades, being used in the United States, Brazil, and other countries.

In the first part of the text, we show the meaning of meritocracy, a term created by Michael Young<sup>5</sup> in 1958, with a pejorative sense, but that, through time, gets a positive meaning by certain groups. The values that justify the existence of a meritocracy, however, are much older, and refer to the changes through which the European continent had gone through in the Modern Age. First birth was seen as determinant to the destiny of individuals, then individual abilities and efforts started to be defended as distinction criteria to value actions.

In a second moment, based by the fact that Young was inspired by the educational reforms in the United Kingdom from 1944 on, we discuss the situation of English public<sup>6</sup> school and teachers' work, analyzing the tensions present since the universalization of the educational system between 1870 and 1944. Margaret Thatcher's government starts in 1979, among its proposals is the implementation of meritocracy in teachers' work management. Many researchers link meritocracy to bonus payment to the teachers depending on the results, but it is also related to the resignification of teachers' work and the reforms of English educational system.

## The meaning of the term meritocracy

The meaning of the term meritocracy is complex, but its semantic origin is attributed to English sociologist Michael Young, in his dystopic essay *The Rise of the Meritocracy*, published in 1958. "For hundreds of years society has been a battleground between two great principles – the principle of selection by family and the principle of selection by merit". (Young, 1967, p. 30). The author introduces the notion that meritocracy is a system opposed to that of the aristocratic privileges. The text reconstructs, by the narrative of a character from the year 2033, the steps that led Great Britain to change its criterion of social organization. It follows the facts until 1958 and, from that on, imagine the future of a system that has merit as its social organization factor.

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<sup>5</sup> Despite having the same name as the current Emeritus Professor on the Institute of Education from the University College of London, an expert on curriculum studies, this Michael Young is also English, born in Manchester in 1915 and who died in London in 2002. Besides coining the term meritocracy, he was a sociologist, a politician, and an activist.

<sup>6</sup> Translator's note: In this article, I will use the term "public school" to refer to schools open to all and funded by State resources. Though, recognizing that the term in England can also be used to fee-charging schools, mainly directed towards elite groups.

In this dystopia, around the 1870s British leaders started to think it was necessary a system able to select among the masses the individuals with greater merit, by conjugating a high intelligence coefficient and individual effort, to occupy the political positions and the professions of higher social impact. Until 2033, the tests became more efficient, to the point of predicting the intelligence coefficient of individuals right after birth, thus, determining the future of each person. The system became so efficient that it created a new type of employability, and work was distributed according to such coefficients. The stratification defined by the economic power, previously grounded by blood ties, was now supported by an “equally excluding” merit.

The end of the narrative describes a social revolution against the meritocratic system caused by something unusual: according to the character, a defender of the system, the lower classes rioted because the meritocratic system had reached such a high efficiency that, in Allen’s (2011) interpretation, it is seen as a “fair unequal society”. To Allen, Young’s conclusion states a type of technical justification for the inequalities among individuals and groups. A system based on birth was unfair, according to the narrative, as differences emerged from social conditions. However, it was impossible for the new system to attribute failure to contingences, everything became the individual’s direct responsibility. The upper-classes considered this riot the result of resentments and, in the end, we discover that the character has died in one of the confrontations of the 2034 great revolutions.

Young’s text does not intend to make an analytical discussion, following academic standards, on the meaning of meritocracy, but to present the contradictory consequences of subscribing to a principle as the result of an ideology of social organization, a theme of debate in the Modern Times on Anthropology, Law, and State.

According to Barbosa (2006), it is common to connect the birth of meritocracy to European modern period because it was the historical moment in which that society started to question the hereditary privileges of noblemen and the aristocracy. If we go further on, we find references about merit in China, where the recruitment to the public service through public exams was already established in the 3<sup>rd</sup> century B.C. History is not linear, it has many entanglements between the ideals of aristocracy and meritocracy, as both coincide on the defense that the most capable ones should occupy the most prestigious positions in society. The key difference between them is that in the former competence is proved by birth, while in later it is the sum of individual abilities and efforts.

In the modern period emerges a process of social organization based on meritocratic values, based on the defense of liberalism and equality. From the Cartesian rationalism until the Kantian apriorism, an anthropology of equality among all men, as they all have the same intellectual faculties, is built. It is important to highlight that, according to Barbosa (2006), a new meritocratic ideology was born, as a consequence of a new perspective of man, but that it was not yet a criterion of social organization in the 18<sup>th</sup> century Europe. To her, using merit criteria to distribute prestigious positions does not necessarily mean a meritocratic ideology. It can be a technocratic measure, not preventing the use of the birth criteria in other instances. However, a society that develops a meritocratic ideology, will develop an organization system based on merit. This ideology, in the sense of Gramsci (1975), of a certain set of ideas that solidify a certain hegemony, would allow the higher positions to be occupied as a reward for the best ones.

Still, according to Barbosa (2006), the selection by merit is manifested in different currents, depending on how one understands the meaning of meritocracy. For some it has a negative meaning as it refuses privileges and affirms that no individual can have his/her destiny determined by birth and social class. Others highlight the positive value of meritocracy, in which the particular characteristics of the individuals can distinguish him/her from others, affirming the worthiness of the positions occupied. Meritocracy understood as the denial of privileges is accepted by all as a tool against social inequality, but when used as the affirmation of worthiness, it justifies inequalities, a fact that is hardly brought to “ people’s awareness and, much less, explicated and discussed” (Barbosa, 2006, p. 23).

When dealing with meritocracy as denial, the main social consequence of such organization would be the attempt to equalize opportunities of development and social mobility. By understanding meritocracy as an affirmation, it becomes the verification of individual capabilities, but there is rarely a consensus on how to evaluate them, as individuals have very different concepts on what is intelligence, an act of value, or a job well-done. To certify that one individual is better than other never happens without disagreements, thus forcing societies to create norms and regulations to evaluate candidates to prestigious positions. However, the legal formalities do not end with the doubts on the different values given to the efforts and individual abilities (Barbosa, 2006). The consequence is paradoxical, as merit goes from being an instrument of fight against privilege to become a new criterion of discrimination in modern

society. Pierre Bourdieu and Jean-Claude Passeron (1992) also point out this distinction when analyzing French university and its utopia of social order:

Among the senior executives of the University, the Jacobin Utopia of a social order in which everyone would be rewarded according to merit, i.e. according to his School rank, cohabits with the aristocratic pretension to recognize no other values than those of the institution which alone fully recognizes their value and the pedagogocratic ambition of subjecting all acts of civil and political life to the moral magisterium of the University (Bourdieu & Passeron, 1990, p. 148).

In Coutinho (2008) we find meritocratic bias discussed from the access problems of subordinated classes to certain rights. The author resumes the history of liberal values and establishes their relation with citizenship issues. To him, the base on which liberal rights were grounded was human emancipation, in opposition to the absolutist interpretation of the State, but its reasoning is purely rhetoric, supported by the “natural rights” that “were limited to life, individual freedom, and property” (Coutinho, 2008, p. 56). During the development of liberalism there is a systematic delay on the access of the fundamental rights of subordinate classes, that is, those “with no property”, as is the case of the illiterate vote, universal voting, equality of women’s rights, and others.

Among liberal thinkers, we highlight John Locke (1984), who defends the thesis of “natural rights”, mainly the right to property, bringing a version of merit that will influence modern current of thoughts. To him, for instance, “His labour hath taken it [goods] of the hands of nature, where it was common, and belonged equally to all her children, and hath thereby appropriated it to himself” (Locke, 1984, p. 46). Such act gives to the actor the right of calling that “his/hers”. Therefore, labor as a mediation of the “natural right” becomes a moral value and crowns the criteria of merit as one among those that confirm the right to property. Locke continues “He that in obedience to this command of God, subdued, tilled and sowed any part of it, thereby annexed to it something that was his property, which another had no title to” (Locke, 1984, p. 47).

The competent proprietor, to Locke, when taking possession of what was previously common, produces much more than what would naturally emerge. It is also certain that some men will stand out, as they will work more than others and legitimately accumulate the excess, that is, inequality would be natural, as some will make more effort than others. Inequality would be a consequence of the lack of individual effort, as everyone’s origins would naturally be the same. The world is out there to be taken, those with more will enrich more because *they did more*,

giving inequality a moral dimension. Poor people would also have all the capabilities to work and acquire goods, it is immoral not to make enough effort.

This perspective became the dominant ideology in the modern period, including the definition of the roles of the State, circumscribed by the guarantee to enact “natural rights”. Before, inequality was given by an absolute State that legislated autocratically, defining what was right based on its own organization, but now it would be the consequence of the State and its laws. There was the need to redefine what would be its role in the equalization of rights. We can perceive that, under Locke’s conceptualization, different notions of public responsibility emerged, mainly the guarantee of freedom and property. However, the liberal base of the arguments on merit, that stratifies proprietors and non-proprietors, leaves no doubt on the influence of contemporary conceptions on the theme. Liberals after Locke could not solve the paradox between freedom and equality and the role of State. This paradox will be faced by an opposed current that will question the theses of “natural rights” and will place State as the mediator for the solution of inequalities, contributing then to the negative concepts of merit. But the hegemonic liberal tendency after Locke will keep the paradox and will contribute to the affirmative meritocratic thesis, measured only by the criterion of individual effort.

The philosophical conception of Locke would only be literature if it was not the base for important events that took place in England and France in the 17<sup>th</sup> and 18<sup>th</sup> century. Locke actively influence the Glorious Revolution in 1689, helping to create the bases for the bourgeois revolutions and the end of absolutism.

After this brief synthesis on the origins of the meritocratic concepts, we will move on to the discussion on the relation of the meritocratic concept and the implementation of the Education Acts in the United Kingdom since 1870.

## **Reforms of English education on the 1870 Education Act: the compulsory universalization of primary education**

The movement of school universalization in the United Kingdom starts in 1869, in the city of Birmingham, with the first meeting of the National Education League<sup>7</sup>, a group of politicians and factory owners. Alfred Field, owner of the biggest factory in the city, stated in a speech reproduced by Armytage (1970, p. 122), that the products that supplied English colonies were done in the United States, because of the “greater intelligence of the American workers”, and “the reason of their greater intelligence and flexibility of thought” was American public free school. To improve British work force, the immediate establishment of public free schools was needed. Members of workers’ unions also took part in the meeting. The movement held various meetings in the United Kingdom and earned great popular support. In February 17, 1870, the liberal politician William Edward Forster (1818-1886) presented a bill to the House of Commons establishing universal public school. In the United Kingdom there was no rule to determine the limits of bills, the Constitution was practically done through the bills approved by the Parliament. In the case of education, the Law, object of our analysis, is known as the 1870 Education Act.

Among those who questioned the law were private groups of education. Religious institutions saw on it a risk of losing their hegemony on the education of the people and the loss of funding for some educational activities<sup>8</sup>. Schools managed by the private initiative and religious institutions, with paid fees, guaranteed the “desired freedom” to English to choose the best education to their children (Heater, 2001). Added to that, the English feared that an education managed by the State would open a way to “indoctrination and loss of moral standards, which religious institutions still insisted on teaching” (Heater, 2001, p. 117).

However, National Education League understood that this conservatism was delaying economic development. In the sessions proposing amendments to the law, political tensions emerged between industry representatives and religious institutions, allowing, for instance, the maintenance of funding for voluntary and charitable schools for more than a year in exchange

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<sup>7</sup> Movement founded by liberal politicians George Dixon, Joseph Chamberlain, and Jesse Collings in 1867, whose objective was to establish a system of national education free from religious doctrines.

<sup>8</sup> Religious institutions were already receiving state funding, since the 16th century there were instruction houses that combined teaching and craft learning towards orphans and poor children.

for the promulgation of the law. In the following years, the great majority of schools became managed by school boards, until the creation of the 1876 Education Act, thus making school education compulsory. Private sector schools lost many students due to the great development of free public school (Armytage, 1970).

The obligation, imposed to parents and industrialists, of children to attend school is a good example of the contradictions on the development of the idea of equality proposed by the new law. When the children started to attend school, the authorities and inspectors could have a glimpse on the “extent of under and malnutrition” (Armytage, 1970, p. 128) they suffered. Rules were quickly created for food and health care, followed by the ban of children under the age of 10 to work in factories. John Mundella (1825-1897), a politician of the Liberal Party, faced by hostile reactions of families due to the income loss from children labor, defended that parents should be as responsible for their children’s education as the State.

However, compulsory and free education in Great Britain was more motivated by technocratic reasons than meritocratic ones. The contributions of progressive politicians and representatives of the working class were important and pointed out towards the negative connotation of merit, but the main reason was to attend the needs of industrial groups that needed a *new* type of worker.

The 1870 Education Act opened the possibility to combat privileges, but it was still very vague and did not establish anything beyond universal elementary education. Nevertheless, as the administration was done by school boards, which had autonomy to attend the needs of their districts, many alternative ways of good quality post-elementary studies were created. The school boards, elected and autonomous, offered, beyond the elementary education expected by industries, the secondary formation of character with no fees, thus entering in the field dominated by private schools. Public education became also an “alternative way of secondary education that was not exclusively based on fees, social class, and culture” (Robinson, 2002, p. 160). Such offers deepen the tensions in the several groups of interest, creating an atmosphere of more control that will be confirmed by the victory of the Conservative Party in 1895. Among the changes promoted by this new group in power was the introduction of the notion of meritocracy. This change, in particular, dealt with the access to secondary free education and the limitation of the autonomy of school boards.

We will continue this theme in the next item approaching the change of the meritocratic concept in the educational system led by the Conservative Party.

## **New English educational reforms: from technocracy to meritocracy**

In 1896 the Board of Education was created, a central authority that would regulate the action of school boards. Its main functions were to reform the offer of secondary education and initial teacher education in the meritocratic perspective. This Board centralized the guidelines for the development of the education system and, in the 1902 Education Act, abolished school boards, establishing a type of council of local authorities of education, whose administration was under the responsibility of the government. The school boards were “too democratic for a conservative government” and “threatened the established social order” (Robinson, 2002, p. 167). The first argument raised against the alternative secondary education offered by them was the “illegality of spending tax-payer money in advanced education” (Robinson, 2002, p. 161). Robert Morant (1863-1920), a politician in charge of the Board of Education, argued that the education offered in the “pseudo” secondary “education” ran by school boards “was too scientific”. The secretary responsible for the creation of the secondary education proposal defended that the “ideal curriculum was mainly literary and linguistic, science was merely tolerated” (Eaglesham, 1962, p. 157). Local authorities were forbidden to offer any education, beyond the elementary level, and the 1902 Education Act created a meritocratic solution, establishing that “poor brilliant students” could attend free secondary education. Schools had to select stand-out students, however this was never done, keeping the meritocratic solution in the rhetoric field (Keating, 2009).

Regarding teachers’ work, in the context of public school emergence in the United Kingdom, the meritocratic tensions also marked the disputes between various groups leading public policies (Bergen, 1982). The United Kingdom had already established its civil service system in 1870, but teachers were not included in this group. The main problem was the structure of the State and its representations in the Board of Education, inspectorates, and school councils, as those elected were from the middle class, while primary public school teachers belonged to poorer classes. The self-evaluation of elementary teachers as part of the teaching class, however, made them believe they were part of the middle class. After entering

school and going through a rigorous selection process, they were separated by their peers at the age of 13 and employed by local administrations to work in elementary school while simultaneously attending theoretical development courses in secondary schools. They ended up having a relative authority on their social group, what made them start to consider themselves worthy of a professional title (Bergen, 1982).

The 1902 Act Education has sealed the destiny of elementary school teachers in their struggle for recognition to keep the division between primary and secondary education. Since the foundation, in 1870, of the National Union of Teachers, there was the proposal of creating a unified national registry<sup>9</sup> for this professional group, but there was a competing similar proposal from secondary teachers, so that the registry would be exclusive to them. The proposal of a secondary free and universalized education, such as the elementary, would create a single teaching profession and would guarantee the social mobility of primary teachers. Secondary teachers saw in this proposal a break on the class limits, and, reacting together, guaranteed that the roles continued to be exclusively played by them.

The same argument that kept elementary teachers in the borders of the established stratification was used to justify the stratification between secondary and primary school. The note of the politician John Gorst (1835-1916), vice-president of the Board of Education in 1901, on a possible unified system, illustrates a concept of merit that tolerated the access of poor students only in the elementary education, but not in the subsequent levels:

While primary instruction should be provided for, and even enforced upon all, advanced instruction is for the few. It is in the interest of the Commonwealth at large that every boy and girl showing capacities above the average should be caught and given the best opportunities for developing these capacities. It is not in its interests to scatter broadcast a huge system of higher instruction for anyone who chooses to take advantage of it, however unfit to receive it (Bergen, 1982, p. 16).

With the approval of the law, the limits between classes were crystalized and the affirmative conception of merit won over the negative one. For social mobility, the working-class student needed to prove his merit. The access of a teacher to the middle class was conditioned by his own formation in secondary school. Instead of establishing mediations against privileges, criteria of competence evaluation were created. The reception 1902 Education

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<sup>9</sup> Similar to the current registers for physicians, dentists, and lawyer.

Act was so negative in the community that the reactions echoed on the defeat of the conservative party in the general elections in 1906.

When getting into power, the Liberal Party approved the 1907 Education Act, which established the free place system. The secondary schools that received public resources should reserve 25% of its places for students from elementary schools. A collectivist agenda was developed by the government until the beginning of World War I, when policies of social welfare gained strength thanks to the constant manifestation of the working class. Meals started to be offered in the schools and even a health inspection system was created to monitor children, however these measures were “broadly criticized by conservatives who claimed that the State was removing the responsibility from the parents” (Andrews, 1976, p. 31). Liberals understood that the development of the quality of life and education of the working class was not only a social obligation, but also a guarantee that the “United Kingdom would have its chances in the competitions that would be established among European countries, especially Germany” (Sherington, 1976, p. 67).

According to Simon (1986), the legislation that will bring the next meaningful change, and would later become the source of inspiration for *The Rise of the Meritocracy* by Michael Young, was the 1944 Education Act, which emerged from the concerns of World War II<sup>10</sup>. The difficulties and traumas from the conflict made grew a “sense of solidarity and demand for social reforms that, in the education field, were centered in the creation of a national education system” (Barber, 1994, p. 352). Many war failures, in Simon’s (1986) perspective, were justified by a lack of a social cohesion of the British people, in a system in which the greater population mass was ruled by a selected group educated in a school closed to most.

The demands for social changes aimed the increase of obligatory schooling from 13 to 16 years old, in a common code of legislation that would abolish schools controlled by the private initiative and guaranteed a free secondary education for all children over 11 years old (Simon, 1986). The 1944 Education Act tried to befit these demands and was proposed by Richard Austen Butler (1902-1982), a conservative politician, indicated by Churchill as the

<sup>10</sup> Enforced during Winston Churchill’s (1940-1945) government, Prime Minister from the Conservative Party.

president of the Board of Education in 1941. Butler demanded six civil workers to write a new law for education. Griffith Williams's<sup>11</sup> perspective, the most influent of those six, prevailed:

“He was determined to preserve selective grammar-school education .... His response to the social upheaval of the War was to argue for the end of patently social selection – fee-paying and the admission of wealthy but academically inadequate pupils to grammar schools – as the price to be paid for the retention of the more important principle which was academic selection and segregation. The 1944 Act reflected his goals precisely. He was promoting ‘meritocracy’ before the word was invented”. (Wallace, 1981, p. 285).

The system proposed a secondary education divided into three different schools: *grammar schools*, which offered academic formation aiming to prepare for higher education; *secondary technical schools*, aiming vocational learning, and *secondary modern schools*, which offered general formation. At 11 years old, the child leaving elementary education would have to do an exam, which became known as 11 plus (11+), the results would indicate which of the three schools was the most appropriate. In reality, the three-school system kept the previous division, between the elites and the poor, but it now reflected the spirit of denying birth privileges. It was no longer guaranteed that the middle-class children would attend *grammar schools*. Previously, there was a great barrier, the need to pay for the studies, thus 75% of secondary places were open to them; but now that secondary education was free, the academic merit would create the possibility of all places being, theoretically, occupied by the working class. Teachers' work, in the context of the law, was highly valued. To Butler, teachers were one of the three pillars according to which the national education system could work, besides the central government (that ceased to be the Board of Education to become the Ministry of Education) and the local educational authorities. However, this statute will be radically crumbled since the general elections of 1979, when Margaret Thatcher was elected prime minister.

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<sup>11</sup> Public servant connected to the Board of Education, as a secretary of the Secondary Schools Examinations Council. He will conclude that many “academically incapable” students that attended secondary education did so solely because they could afford it. Thus, he will defend the selection criterion through merit to academic school, the so-called *grammar schools*.

## Reforms on Margaret Thatcher's government: management of teachers and the educational system

The administrative reforms implemented by the Thatcher administration from 1979 to 1990 were based in an administrative rationality whose premise was the decrease of the State role and the introduction of market practices to manage public services, measuring performance, introduction of competition, and management by results. According to Barber (1994), to conservatives the bureaucracy of the public sector was responsible for the decline of United Kingdom after the war, as it would have created an environment in which the personal interests of public agents multiplied at the cost of abandoning the interests of society. By introducing competition practices, Thatcher's government believed it was possible to change the professional behavior of agents (Arnott, 2000).

The system to access tripartite secondary education started to be converted into a *comprehensive schooling* in the 1960s, a process completed when Thatcher was Secretary of State for Education and Science between 1970 and 1974. Though she and conservative prime minister Edward Heath were committed to a system that maintained the division among schools, both the working and the middle class were unhappy with the divided system: the first because it demanded, since the end of WWII, a comprehensive system, having *The Rise of the Meritocracy*, of Michael Young, as its great manifest; the later because their children were forced to attend the *secondary modern schools*, stigmatized as institutions for low-intelligence young people (Barber, 1994).

With the English economic failure after the WWII, many politicians started to blame education and teachers. British authors state that the article "I blame the Teachers" published on *Times Educational Supplement* on January 1976, by Sir Arnold Weinstock, director of General Electric Company, is one of the main ideological milestones for the crisis of trust on education and teachers' work that will mark Thatcher's administration. The article accuses the administration of education to be overly bureaucratic, creating an unproductive and inefficient learning environment, which was not well-run and incapable of correcting its own mistakes. It accused teachers of having a low performance due to their work stability and high salaries. Teachers were also accused of having political positions committed to the end of liberal institutions. The solution to reconstruct English economy was to increase the offer of professional qualification in school and aim a higher integration with the industrial management

logic to overcome its inefficiency (Ferreira Junior & Bittar, 2014). English education started to suffer a crisis whose base was purely discursive, fed by journalist articles, which climaxed on October 1976, when the then Secretary for Employment James Callaghan (1974-1976) made a speech on the University of Ruskin and blamed school for the decrease of English economic international competitiveness (Hall & Gunter, 2015).

In power, Thatcher managed to approve the 1988 Education Act, whose main measure was to centralize decision-taking on the Ministry of Education, removing the participation of local authorities and immediately subordinating schools to the central authority. Local authorities received resources to manage education since the 1944 Education Act, but this was changed so that more than 80% of the financial resources could be managed by the central authority. In this new arrangement, the Ministry of Education promulgated laws and provided resources, while local authorities were responsible for implementing the legislation, the teachers were responsible for the application of the curriculum and the evaluation (Arnott, 2000). It was a hierarchy of powers, concerned with the systematic contention of expenses and the responsibility on the invested resources, translated in the creation of a national curriculum, national tests, publicized performance indicators, regular inspection, teachers' evaluation, and payment by performance (Barber, 1994).

Margaret Arnott (2000) argues that, regarding teachers' work three main changes remodeled the meaning of the profession: the first refers to the regulation of the work environment, from board system to a centralized one, based on performance management. Teachers were not any longer partners of the State in the construction of education and started to simply follow orders. The main tool of teachers' work regulation was the national curriculum, established in 1988, with no participation of teachers and other education professional. The second change was the external regulation of teachers' work. The self-regulated nature of public service workers was questioned by the introduction of a follow-up by external examining instances. Therefore, in 1988, the Schools Examination and Assessment Council was created and many other smaller instances that defined school policies and evaluated their implementation. Since 1833 the United Kingdom already had a system of school inspectors known as Her Majesty's Inspectors (HMI), whose aim was to evaluate the use of public resources in schools, but, in 1992, it was privatized and now the inspections focused on the level of success and failure of each school. In this system, teachers were no longer responsible for evaluating students' learning and the supposed efficient of their work was measured from

criteria established by agencies outside the school. The third novelty, to Arnott (2000), was the return of the school boards. The aim now was to directly involve students' parents in school decisions, while the local educational authorities (that substituted the councils in 1902) continued to be exclusively managed by a central administration. Government expected that this would further approximate teachers and consumers, thus increasing their sense of responsibility. Parents and the school principals composed the boards. They had executive powers, but the members could rarely understand the problems and specificities of school work, thus principals had more decision-making power.

Until Thatcher's government, teachers' unions were very influent in the decisions and, despite existing five different unions, the negotiations were collective, with a national salary standard and working rights within a common agenda. But, the 1987 Teacher's Pay and Conditions Act eliminated collective negotiation, what "weakened teachers' movement by fragmenting the contingent" (Levin, 2004, p. 38). The law made the situation even more difficult as with the weakening of local authorities schools could disaffiliate and hire teachers by themselves; because the movement was gradual, there was no great union mobilization to fight it. The main characteristic of this type of hiring was the flexibilization of contract terms, which the collective negotiations had guaranteed to be done by local authorities (Demaine, 1988).

Such reforms aimed to answer the criteria of the "New Public Management", which consisted in applying the discipline of the private sector in the public one. The main premise was based on the theory of "public choice" which asserts that, when there is a competition for the services, the citizen can be the judge to define what is best, and thus is satisfied by the correct use of the taxes paid (Tolofari, 2005). Ludwig von Mises (2010, p. 14), a defender of the public choice, calls this arrangement the "democracy of market", and sees State democracy as an obstacle that removes from citizens their power of selection. Milton Friedman (1984, p. 89), one of the founders of the Chicago School<sup>12</sup>, understood that in the field of education the ideal would be to privatize schools, so that there could emerge a "healthy competition, that would create more flexibility and guarantee the progress of good institutions and the end of bad ones, as well as making teachers' salaries more sensitive to market regulation". Margaret Thatcher, after been presented to the ideas of Friedman by her advisor Keith Sinjohn Joseph (1918-1994),

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<sup>12</sup> Name given to a group of intellectuals from the University of Chicago who defended the free-market. Their ideas were enacted during Pinochet's dictatorship in Chile in 1970s, Thatcher's (United Kingdom) and Reagan's (United States) government in the 1980s.

has never hid her admiration for his work, often quoting him in her speeches, considering that the economist was “an intellectual who fought for freedom” (Jones, 2006).

The group that supported Thatcher’s reform became known as “the new right”. The group understood welfare State as an inhibitor of free initiative, by granting too much power to the working class, what would create a negative impact in workers’ productivity (Ferreira Jr. & Bittar, 2014). Education seen through their eyes is no longer understood as a right but as an object of the Market. Standardized tests were used to create a product. With the quality indicators of a school, parents-consumers could choose a school, just as someone would do among different car models in a dealership. This logic has placed on teachers’ shoulders all the responsibility for the quality of education and transformed principals in operation managers, crushing the spirit of academic collegiality. In search for improved public services, the State starts to evaluate and propose performance standards, whose aim was to separate the efficient from the inefficient public agent, the deserving and the non-deserving. By limiting teachers’ role in education, the grades on the tests applied to students would be the measure of teachers’ success. Thus, establishing the notion of meritocracy in teachers’ work, not only connected to a bonus payment, as this work situation was beyond them.

## Conclusion

Throughout this article we have tried to explore the origins of the term meritocracy, coined in the work of Michel Young (1958). We took a step back in search of references from John Locke, resuming the notion of “natural rights” and work as a moral value in the construction of a mentality of individual effort as a criterion to reach wealth. We have tried to show how meritocracy develops in two branches, the negative and the positive. The first, in a movement to overcome the aristocratic mentality and the second as a State mechanism to regulate inequalities within social systems. We have brought some unfoldings of this concept through English educational reforms during the second half of the 20<sup>th</sup> century, distinguishing their uses in the period immediate after the War and between 1979 and 1990, with the reforms of Margaret Thatcher.

The period after Thatcher as Prime Minister did not mean the end of the “new right” project, which continued with Prime Minister John Major (1990 and 1997), but meant the end

of what Michael Barber (2004) calls “free-market pragmatism”. From 1990 on, we could see that managerial policies provided a great control on the education system and a proposal of a new Education Law presented in 1993, when politician John Patten was Secretary of Education, granted total power to the central administration. Though the political discourse of the “new right” used the minimum State as a reference, we can see that this idea was not extended to decision-taking processes. Among the results of Thatcher’s reforms were various tensions between teachers and governments, leading to boycotts of external evaluations and an increase on the gap among teachers, schools, and the Secretary of Education.

For the English think tanks, a way that could united budget costs and more efficiency in the school system is the voucher proposal, defended by Friedman (1955) on the essay “The Role of Government in Education”, which proposes state funding of private education through the promotion of school choice. There was an attempt to transform this proposal into law during Thatcher’s administration, but the idea to transfer public resources to private institutions was scandalous, thus, it was not approved (Ravitch, 2011). However, the idea of demanding performance under market criteria was applied in the public system, mainly regarding the connection between salaries and results, what we now know as “quasi-market”. Though the national system of education continued as the main access to education, many initiatives with churches and foundations appeared as a way to diversify the educational offer.

In 1997 the Labour Party returned to power with Tony Blair, but the rupture expected with the policies implemented during Thatcher’s conservative period did not take place. Partnerships between public and private spheres were incentivized aiming to diversify educational offer. Again, the idea of equality is abandoned in favor of the notion of managing individual competences, mainly by incentivizing the participation of companies in school funding and, consequently, their interference in the curriculum. In 2002, when announcing a program that awarded schools by their results, Blair stated in various discourses that English education needed meritocracy to improve results, leading to Michael Young’s reaction, published by the newspaper *The Guardian*, in which he affirmed, among other things, that if the Prime Minister really understood the meaning of the word, he would be raising the taxes on wealth and not proposing competition between schools (Young, 2001).

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