

Disentangling Meritocracy Among the Long-Range Upwardly Mobile: The Chilean Case

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journals.sagepub.com/home/sro**Malik Fercovic**

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Abstract

In a world of rising income and wealth inequalities, studying popular concern or consent about inequality, social mobility and meritocracy is increasingly relevant. However, while there is growing body of research on the explanations individuals provide for inequality in the US and Europe, there is a striking absence of studies addressing how people experiencing long-range upward mobility relate to meritocratic values in Latin American societies. In this article I draw upon on 60 life-course interviews to examine how long-range upwardly mobile individuals – those who best embody the meritocratic ideal – explain their success in Chilean society. Internationally well-known for the implementation of radical neoliberal reforms since the mid 1970s, Chile has both elevated levels of inequality and high rates of occupational mobility. Contrary to the individual-centred approach to meritocratic success dominant in the existing literature, my findings reveal a strong collective framing in respondents' accounts and the acknowledgement of external factors shaping their upward trajectories. These findings bear important conceptual, methodological and geographical implications for the future study of social mobility and meritocratic values.

Keywords

Chile, meritocracy, upward social mobility

Introduction

In a world of rising income and wealth inequalities, meritocracy and social mobility have become two central concerns in both the social sciences and public policy. An increasing body of research has focused on how the position people occupy in the

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social structure is related to the explanations individuals provide for inequality (De Graaf et al., 1995; Duru et al., 2012, Duru-Bellat and Tenret, 2012; Hadler, 2005; Roex et al., 2019) as well as how social mobility shapes people's beliefs related to meritocratic values (Bucca, 2016; Ellemers, 2001; Gugushvili, 2016; Jaime-Castillo and Mareques-Perales, 2014; Wegener and Liebig, 1995). Studying people's own beliefs is significant as they can be a crucial indicator of the legitimacy of a given stratification system, the notions of social justice generally believed in, as well as the potential for social unrest tied to inequality (Kluegel and Smith, 1986). Recent comparative research across western societies reveals that growing inequality is accepted by the popular belief that the income gap expresses a meritocratic process (Mijs, Forthcoming).

Built mostly around a survey-based research, this growing literature has gained traction in recent years, mainly focusing its attention on European and North American societies. By contrast, Latin America, the most unequal region in the world (López and Perry, 2008), has remained strikingly under-researched. The scarce literature available on this region reveals a disconcerting paradox: restricted social mobility linked to high inequality coexists with elevated perceptions of socioeconomic meritocracy (Bucca, 2016). Yet, survey-based research, while offering the possibility of identifying distinctive patterns regarding beliefs about inequality and meritocratic values in Latin American societies, also risks neglecting the *contextual specificities* and the *meaning-making processes* in which these phenomena are embedded. The latter aspects can be both better addressed and understood through qualitative-based research (Bertaux, 1989).

This article widens the geographical and methodological scope of the existing research on social mobility and meritocracy by focusing on the Chilean case. Internationally well-known by the implementation of pioneering and radical neoliberal reforms since the mid-1970s (Harvey, 2005), Chile has both elevated levels of inequality and high rates of occupational mobility (Torche, 2005). Research suggests a strong trend towards social closure in the access to the top professional class (Espinoza and Núñez, 2014; Zimmerman, 2019) coexisting with a significant expansion of meritocratic values in the population (Encuesta Nacional Bicentenario (ENB), 2006–2013; Valenzuela, 2007; Valenzuela et al., 2008). There is, however, a conspicuous lack of studies focusing on upwardly mobile people coming from working-class backgrounds and reaching high-status occupations after attending Chile's top universities.

Drawing on 60 life-course interviews, this article specifically examines how people experiencing long-range upward mobility – those who are the best representatives of 'success' according to the dominant meritocratic narrative in contemporary Chilean society – relate to meritocratic values to make sense of their trajectories in a highly unequal society. Against the individual-centred approach to meritocratic success dominant in the existing literature, my findings reveal a strong collective framing in respondents' accounts and an acknowledgement of external factors shaping their upward trajectories. These findings, I argue, have important conceptual, methodological and geographical implications for the future study of social mobility and meritocratic values.

Meritocracy and the experience of social mobility: bringing Latin American societies to the fore

In his satirical *The Rise of Meritocracy*, Michael Young (1958: 74) defined merit as the sum of intelligence and effort (' $I + E = M$ ' was his formula). As an ideal, meritocracy is closely connected with social mobility: a meritocratic society would be characterised by a lower degree of ascribed elements moulding people's class and status, thus leaving more room for individual talents and endeavours as determining factors of the positions they occupy in the social structure. Empirical sociological research, however, has consistently conveyed a critical approach to the implementation of the meritocratic ideal. Rather than enhancing mobility, meritocracy remains predominantly linked to the reproduction of class or status positions (Breen, 2004; Friedman and Laurison, 2019; Goldthorpe et al., 1980; Goldthorpe, 2003). By showing to what extent life chances still largely depend on the social class of origin, this scholarship has been highly relevant to check the normative commitments tied to social mobility and meritocracy in contemporary societies.

Nevertheless, this central body of research in social mobility has left what people themselves perceive or believe about meritocracy significantly under-researched (Castillo et al., 2019). Yet people's perceptions and beliefs on social inequality and meritocratic values deserve serious academic attention. They can be a key pointer of the legitimacy of a given stratification system, the notions of social justice generally adhered to, as well as the potential for social discontent associated to inequality (Kluegel and Smith, 1986). Based on these considerations, an important stream of research has examined how the position people occupy in the social structure is related to the explanations individuals provide for inequality. This research contends that people occupying more privileged locations in society tend to explain their positions by reference to individual qualities or factors that are under their control, while those in more disadvantaged positions invoke structural forces or exogenous factors (De Graaf et al., 1995; Duru-Bellat and Tenret, 2012; Hadler, 2005; Lerner, 1980; Roex et al., 2019). Recent comparative research across western societies suggests that growing inequality is accepted by the popular belief that income disparities are reflective of a meritocratic process (Mijs, Forthcoming).

Social mobility can also act as a powerful influence shaping beliefs about inequality. Assuming that people's beliefs about inequality are largely coupled with psychological mechanisms (Burger, 1981; Crocker and Park, 2004), this research suggests that socially mobile people rely on their own experience as a crucial yardstick to assess their own success or failure as well as that of other members of society. In particular, this research argues that upward mobility might boost 'individualistic' views about inequality, as upwardly mobile individuals would mainly attribute their trajectories to their personal efforts and abilities. By contrast, downward mobility would encourage 'structuralist' accounts of inequality, as a downwards trajectory is generally attributed to external factors (Ellemers, 2001; Gugushvili, 2016; Jaime-Castillo and Mareques-Perales, 2014; Kluegel and Smith, 1986; Wegener and Liebig, 1995).

This mainstream body of research, however, is characterised by conceptual, methodological and geographical limitations. Conceptually, this literature bears a reductionist

understanding of social mobility, conceiving social mobility only in terms of the *direction* involved (upwards or downwards) in the social space. Yet, it overlooks the *range* (the distance covered), *speed* of movement (Friedman, 2016), and the specificities of occupational fields (Friedman and Laurison, 2019) – factors which are highly significant for a richer understanding of how the socially mobile relate to meritocratic values. Methodologically, this stream of research has been constructed almost entirely using quantitative data from large, systematic samples. From these methods and data, this research provides accounts for meritocratic values in terms of aggregated characteristics of individuals or modelling explanation in terms of variables and variance explained. Nevertheless, as conveyed by important qualitative-based research (e.g. Bertaux, 1989; Duru-Bellat and Kieffer, 2008; Friedman and Laurison, 2019; Irwin, 2015; Naudet, 2018; Lawler and Payne, 2017), a quantitative approach alone risks neglecting the *contextual specificities* and the *meaning-making processes* shaping the way people relate to inequality and meritocratic values. Geographically, the main focus of the existing literature is on European nations and the US. This narrow attention on the global north, however, has left the global south strikingly under-explored.

Some of these limitations has been redressed by comparative research focusing on the specific case of those people experiencing a long-range upward trajectory. In his qualitative study of in the US, India and France, Naudet (2012) explored the way the long-range upwardly mobile themselves explain their trajectories and along their efforts to adjust to a new social status. Naudet reveals the following four principal common repertoires of explanation: the desire to ‘escape from poverty’, luck, the value of education and being talented. While emphasising the commonalities across national contexts, this research also acknowledges important national specificities. Upwardly mobile individuals in the US tend to underscore repertoires referring to market forces, Indian interviewees show a strong propensity to downplay their own agency in their achievements, and French respondents struggle to acknowledge the role ambition played in their upward trajectories. Still, notwithstanding all its qualities in expanding the methodological and geographical scope of research on social mobility, this research only marginally engages with the notion of merit.

Latin America societies still remained surprisingly under-researched. However, the scarce literature on the region reveals an unexpected paradox: in these unequal and rigid societies, people’s beliefs on wealth and poverty are attributed to individual merits or faults rather than structural restrictions (Bucca, 2016). In other words, limited social mobility, especially at the upper echelons of the social structure, coexists with a high perception of socioeconomic meritocracy. These startling findings, built exclusively on survey-based research, warrant further and more detailed examination. In this article, I widen the geographical and methodological scope of the existing research on social mobility and meritocracy by focusing on the Chilean case.

The Chilean case: the Latin American land of meritocracy?

Chile is Latin America’s most prosperous economy. The country’s current prosperity finds its roots in the neoliberal reforms initiated by Augusto Pinochet’s dictatorship since the mid-1970s, involving a series of radical and systematic pro-market and privatisations policies (Harvey, 2005). Since the return of democratic governments in 1990, Chile has

experienced a general and sustained improvement in its levels of development. In recent decades, the country has been characterised by a remarkable economic growth, a substantive reduction of poverty (declining from 40% to less than 10%), an increase in real wages, educational expansion and access to mass consumption (French-Davis, 2018; Larrañaga and Rodríguez, 2015). Chile is now a middle-income OECD member country reaching a per capita income of US\$25,222 (PPA) in 2018 – the highest in Latin America and roughly analogous to Eastern European EU member states such as Poland (World Bank, 2019).

Yet, like most Latin American nations, Chilean society is characterised by inequalities in income and wealth that are among the highest in the world (López et al., 2013; UNDP, 2017). Chile combines high income inequality and elevated occupational mobility (Torche, 2005, 2014). The country's inequality/mobility association reflects a distinctive pattern expressed by a short-range high mobility in the bottom of the social pyramid, combined with a strong tendency to social closure at the top. Thus, the main barriers to class mobility are closely shaped by the specific type of inequality: low intergenerational mobility in the upper stratum coexisting with greater social fluidity in middle and lower classes (although see Espinoza and Núñez, 2014).

The stark rigidity at the top of the social structure, however, has not prevented the expansion of meritocratic values among Chileans (Castillo et al., 2019). The latter seem to be gaining prominence in the population in recent decades, though Chilean meritocratic values are not the most pronounced in Latin America (Bucca, 2016). Chileans are disposed to attribute poverty and wealth to individual causes (work, discipline, talent) rather than to external factors linked to social structures; they also show a preference for remunerations rewarding effort and efficiency, regardless of whether this creates inequalities or risks in terms of job security, which are considered transient or well-deserved. People are inclined to believe that well-being depends primarily on individuals' productivity and not on the state initiatives, though they still depend deeply on family life and religious beliefs (ENB, 2006–2013; Valenzuela, 2007; Valenzuela et al., 2008). Social mobility, in short, is understood primarily as an individual achievement – a trend considered highly prevalent in Chilean society (Landerretche and Lillo, 2011).

In the Chilean context, however, there is a conspicuous lack of studies focusing on upwardly mobile people coming from working-class backgrounds and reaching high-status occupations after attending Chile's top universities. Based on an extensive qualitative research, this article specifically examines how people coming from disadvantaged backgrounds and reaching high-status occupations – those best representing the embodiment of the meritocratic ideal – relate to meritocratic values to make sense of their trajectories in a highly unequal society.

Data and methods

From August 2017 to September 2018, I conducted 60 interviews with first-generation professionals who did their undergraduate studies at Chile's two most renowned universities: Universidad de Chile (UCH hereafter) and Pontificia Universidad Católica de Chile (PUC hereafter). Initially, I recruited participants with the support of both these academic institutions (25 interviews). I filled the remaining gaps using a snowball sampling technique (35 interviews).

I conducted a specific type of semi-structured interview oriented to the analysis of biography and personal trajectory over the life-course: *life-history* interviews (Bertaux, 1989). This type of interview has been previously used in social mobility research and is particularly suited to the study of subjective interpretations and social processes, as well as the diachronic dimension of social mobility (Bertaux and Thompson, 1997). These interviews were used to provide and examine in-depth information regarding participants' emotional, social, cultural and moral continuities and ruptures over their life-course. The main focus was on how the long-range upwardly mobile themselves understand and make sense of their unlikely upward trajectories in the Chilean context.

The *long-range* upward mobility of respondents was defined by combining two variables: education and occupation. The *class of origin* was defined by parents holding a (1) primary or secondary degree,¹ and who (2) work(ed) in the informal economy,² a blue-collar, or low-status white-collar jobs. The *class of destination* was defined by men and women having a (1) university degree from UCH and PUC in Law, Medicine, Engineering, and (2) at least 5 years of work experience. Both UCH and PUC are the most selective universities in the country and are crucial channels to achieve subsequent influential positions in society (Zimmerman, 2019). Law, Medicine, and Engineering, are the most prestigious and best remunerated professions in the country (UNDP, 2017). Respondents were equally divided in terms of their alma mater, their high-status professions (20 medical doctors, 20 engineers and 20 lawyers), and their gender. At the time when I conducted the interviews, all respondents were employed, except four of them – two of whom were conducting doctoral studies, another on a sabbatical, and the last searching for a job.

The interview protocol was the same for all participants. Interviews were all conducted by myself in Spanish and lasted from 90 to 180 minutes. More than half of them were divided into two or more sessions, took place at the time and location of participants' choosing, and were tape-recorded and transcribed verbatim when participants consented (all participants provided written informed consent). The interviews addressed a wide array of topics from respondents' family history and background to their current lives as a first-generation professional, covering their childhood, schooling, university training, transition to the labour market and work experience, choice of residence, partner, and the schooling of their own children (when that applied). The data used in this article are based mainly on the answers to a question asked towards the end of the interview: 'Looking back, what do you think made the difference in your case compared to other people who share with you a similar social background but did not experience the same long-range upward trajectory?' All names used are pseudonyms.

I developed coding categories inductively and refined them in tandem with the analysis of empirical material (Charmaz, 2001). This analytical procedure, conducted over a period of a year and a half, gradually allowed me to identify the four themes presented below – all of which emerged as analytically rich themes across the empirical material. Throughout this process, I faced challenges linked with the use of language and translation. With an empirical material in Spanish and theoretical ideas articulated mainly in English, my analysis has been a constant engagement across linguistic boundaries. Yet, semantic similarities across languages cannot be taken for granted (Wigen, 2018). In light of this, I have opted to retain all the relevant idiosyncratic utterances in Spanish, suggesting in parentheses the closest meaning in English I could find.

Findings

My findings highlight four main reasons respondents invoke to relate to meritocratic values and to make sense of their long-range upward trajectories. In decreasing order, the most frequent reasons invoked by respondents are the following: effort, support, luck and intelligence.

Belonging to ‘people of effort’

Most interviewees highlight effort and hard work as a relevant explanation for their upward trajectories. In so doing, they address one of the central components of merit as originally defined by Michael Young (1958: 74). Interestingly, going beyond this rather narrow definition of merit, respondents provide a complex understanding of effort. Indeed, most of my respondents offer a wide range of references to effort to which they identify with, from collective undertakings to personal experiences linked to their long-range upwards trajectories.

One of the most common references to effort is rooted in their families. Lorena Fernandez, a middle-age engineer from UCH, provides a good illustration of this point. Lorena’s comes from a family embedded in the poor city-dwellers, known as *pobladores*, which were a significant part of Chile’s working-classes throughout the 20th century (Espinoza, 1988). Lorena describes her family background as ‘*gente de esfuerzo*’ (people of effort). By this, Lorena means people that worked hard ‘in whatever job they could’ to make a living. Lorena considers this attitude not only key to face adversity and economic precariousness. She also sees it as an important way to avoid the threats that were part of her environment – violence, drugs and crime (Martínez and Palacios, 1995; UNDP, 2017: 165–168) –, perform well at school and eventually reach economic stability. Even if Lorena currently lives a very different life compared to her parents, she still identifies with this attitude and sees it as a ‘key’ aspect in upwards trajectory.

Francisca Vergara, a lawyer from UCH, provides a similar approach to effort when trying to explain her unlikely social ascension. After her father passed away, she refers to the ‘constant efforts and sacrifices’ made by her mother to maintain the economy of the household and her two daughters’ focus on school:

‘When I look back, I cannot avoid thinking about the central role played by my mother. At the time we were in a really difficult economic situation, and she made constant efforts and sacrifices to keep my little sister and myself afloat, working in all different types of jobs, whatever she could find really, so we could study. All that I saw in her stayed with me all my life, her effort, discipline and hard work. And I think that it has been a central element for me in my life, then and now, a central element to explain my success.’

Francisca’s perspective on effort is widely shared among respondents. Most of them place a strong emphasis on effort as a crucial aspect in explaining their long-range upward mobility. But this emphasis is not primarily understood in individualistic terms. Rather, it is articulated as part of a collective undertaking rooted in the family past of struggling against adversity and the role specific family members played in doing so. Their understanding of effort as key in their experience of mobility is placed in line with

an intergenerational family project and not just something of their own making (for similar findings, see Shahrokni, 2018).

This collective framing of effort is highly prevalent among respondents. Still, in some cases effort can also adopt a more individualistic meaning. Although never fully separating themselves from their families, here respondents give greater emphasis to their individual efforts. Carmen Soto, a general practitioner trained at PUC, offers a good illustration of this emphasis:

I am the daughter of rigour effort, discipline. I made an enormous effort to leave my family and to come to Santiago to study in the secondary school and later at university. And that was not for free. I am well aware of the costs that involved for me, something I do not see among my colleagues. But all that also made possible in a way what and who I am now.

Carmen gives voice to the way many respondents see their upward trajectories: as a continual process involving great and sustained effort and sacrifices to reach their current position of improved occupational and economic conditions. Moreover, as Blanca suggests, this invocation of effort is often closely tied to a clear differentiation from people from privileged backgrounds with whom they have interacted at university or in occupational settings – an element which is central for their boundary-making undertaken by the upwardly mobile (Castillo, 2016; UNDP, 2017: 247–248). Carmen's interpretation of effort is confirmed by Cristina Martínez, an electrical engineer from UCH, who makes an explicit contrast between privileged people, and those like herself who come from disadvantaged backgrounds: 'My story makes me value things. Things are never free in life. And I just think that that is different for other people. Upper-class people take everything for granted'. For most respondents, effort is not experienced and understood in abstract or absolute terms, but in concrete and relational ones.

Alongside this attitude towards effort, some respondents also accentuate their ability to seize the opportunities they had. They thus not only see themselves as hardworking, but also in a constant search for opportunities. Pedro Ramírez, a lawyer trained at PUC, connects this idea of effort to a persistent quest for opportunities, articulating them primarily in terms of an individualistic achievement. In his words,

I think it is a lot of hard-work and effort, no doubt about it. But also to look for opportunities and seize them was key for me. I have generated many of the opportunities myself. Not because it was in my power to generate the opportunity, but because I opened the conversation, I asked the question, because I insisted [*emphasises*]. In that sense it is to seize the opportunity, even if it does not look like an opportunity, to make it possible, to make your own decision and say: 'I want to go there'. I do not like people who just complain about the lack of opportunities. I did not scratch with my own nails. But I took the system, I made it fit into my life, I asked the questions I had to ask. And I did it mostly alone.

Pedro's view of effort and opportunities is closely related to what Arteaga and Pérez (2011) call '*el orgullo de arreglárselas solo*' (the pride of self-sufficiency) (p. 78), a trait which they see as characteristic of the Chilean lower class under neoliberalism. This moral attitude ennobles the ability that some individuals from working-class backgrounds possess to work hard to reach their socioeconomic aims – an attitude separating

those who make efforts to improve their class situation and those who do not, be they poor or privileged (Guzmán et al., 2017). Unlike Carmen or Cristina, Pedro's case suggests a stronger differentiation from the poor or disadvantaged who 'just complain about the lack of opportunities' and lack his ambition. But this approach to effort, indeed closer to a form of 'individualistic meritocracy' (UNDP, 2017: 247), is not dominant among respondents.

'Without them, I would not be in the position I am in at the moment'

Along with the persistent reference to effort, the acknowledgement of different sources of support also has a highly significant place in the account respondents give about their trajectories of steep upward mobility. This support includes a wide array of people and institutions. For most respondents, their nuclear or extended families had a central role in supporting them in their upward trajectories. Beyond their relatives, respondents also acknowledge that schoolteachers or counsellors, university professors and bosses were key role-models or mentors. Finally, respondents acknowledge the role that specific institutions (e.g. schools and universities) played in amplifying their culture and opportunities opened to them and having consequential implications for their subsequent studies or transition to the labour market. Importantly, by recognising these different sources of support, respondents tend to attribute to others a substantial degree of responsibility for their own 'success'.

As with effort, so with support the family stands out as a key basis of assistance. In many cases, members of the nuclear family are recognised as crucial figures in the provision of material, emotional and moral support. Juan González, a doctor from UCH, exemplifies well this type of support:

For me, it was really important to grow up watching the constant work of my parents did for us. I do not mean only the hard work they put into their jobs to bring food to the home. I also mean a more general attitude of constant support for all of us to remain focussed at school despite all the uncertainty.

Juan specifically refers to how his father, a construction worker, built him a special room to study when he was at university: 'a very small room, adjacent to our home, but one in which I could study on my own in the night, quietly'. Juan also underlines the example set by his mother, a housewife turned into a social worker: 'My mother was an example to follow really. When I was studying medicine, she continued to work but also decided to finish her secondary studies and then enrolled at a vocational centre and became a social worker'.

Moreover, like most respondents, Juan received fundamental support not just from his nuclear family, but by his extended kin too. Grandmothers, in particular, played an especially significant role, and Juan is very explicit in acknowledging this:

While my parents were working all day, my grandmothers, who lived with me and my siblings all our childhood, gave us a real niche of security, stability and love. Without them, I would not be in the position I am in at the moment.

Juan's recognition of the support received by his grandmothers eloquently expresses the place that the extended kin have for working-class and lower middle class Chileans. This central place is relevant not only in economic but also in emotional and moral terms (Araujo and Martuccelli, 2012).

The support from which respondents benefitted were not restricted exclusively to their families. The help they received from specific figures external to family circles was key to diminishing the uncertainty they faced and the lack of know-how in their families at pivotal moments in their schooling. Barbara Castañeda, an industrial engineer from UCH, illustrates this point well. At primary school, Barbara considers herself 'grateful' to have found a 'referent' and guide in a schoolteacher who also happened to be her neighbour. 'We were very close when I was little', Barbara recalls. 'She was organised and inspiring, and we often did homework together. She was very helpful. I admired her a lot'. This figure provided the necessary structure and skills for school success and strengthened Barbara's aim to achieve academically – resources and guidance she could not fully find in her parents. Helping Barbara to study and encouraging her, this neighbour intervened as an important 'cultural guide' (Lareau, 2015) – so much so that, by the end of primary school, Barbara was coming first or second in her class. Barbara also benefitted from the assistance from others outside her family in her transition to post-secondary education. Barbara obtained good but not the outstanding scores required to apply to medicine. At this particularly uncertain stage, Barbara was crucially advised to apply instead to engineering at a less prestigious university by a school counsellor. As neither Barbara nor her parents were well informed about this procedure, this school counsellor actively intervened in the application process, and Barbara managed to start her studies in engineering at the university recommended by this figure. After gaining confidence in higher education, the following year she applied and was accepted at UCH. Along with another classmate, Barbara was the only student from her cohort to reach and complete her studies at an elite university. As previous research suggests (Lareau, 2015: 17–20), this kind of help – the assistance or intervention others offered to make on their behalf – is vital in providing the upwardly mobile with the resources that enable them to get educational institutions work for them.

External support beyond the family is also relevant to developing professional careers. The case of Paula Contreras, an engineer from PUC currently working at a prominent mining company, is very telling about the role mentors can play to fast-track the professional progress of respondents. Paula readily admits the importance of her professional mentor, a person with whom she shares a similar social background and upward trajectory:

[Name of mentor] has been very important for me. He was my boss for four years and after that we remained close. He helped me when I made mistakes, opened up opportunities – as he is very skilful at the executive level –, guided me almost on a daily basis, and taught me how to be a good boss. I am the only women of my age in this type of position of authority [. . .] Without him I would not have had this career.

Paula thus recognises the pivotal role her mentor has had for enhancing her professional career. Importantly, this role has been sustained and multifaceted: allocating

valuable work, speaking on her behalf, showing a concrete career pathway. This very demanding and well-rounded type of support is what people from disadvantaged backgrounds required to successfully navigate the organisational ranks of companies dominated by people from privileged origins. As recent research in the UK reveals, however, this is uncommon (Friedman and Laurison, 2019: chapter 6, 207–208). Paula was well aware of this, and she makes this unambiguous by stating that without the help of her mentor ‘I would not have this career’.

Beyond families and individual figures, respondents also benefited from support through specific institutions. The secondary schools known as *liceos emblemáticos* – the highly selective and respected secondary state-schools boosting the access to top universities in Chile – provide a clear example of this institutional support. *Liceos emblemáticos* embody a long-standing tradition of excellence in the public sector, being the main historical channels in the formation of elites in politics, academia, sciences, arts and the liberal professions. Pablo Ortega, an engineer trained at UCH, was educated at Instituto Nacional – the leading school among *liceos emblemáticos* (Bucarey et al., 2014). Founded in 1813, decades before the creation of UCH, Instituto Nacional is anchored in a prominent republican and meritocratic tradition with the explicit aim to train the Chilean elites (Amunátegui, 1889). Although increasingly deprived from the wealthy students once attending this institution, Instituto Nacional still brings the mark of what Bourdieu (1989) calls ‘esprit de corps’ (p. 111): a robust sense of identification each member feels from belonging to an elite academic institution. Pablo brings together all these elements as he recalls being exposed to ‘a special mystic’ and ‘a culture of success’ from the first day he entered the school. In his own words,

From the first day at [Instituto] Nacional, they tell you that this is *el primer faro de luz de la nación* (the first lighthouse of the nation), the best school in the country. They tell you about the presidents, the politicians, the heroes trained in these classrooms. It is a special mystic. *Te ponen la camiseta* (they put the shirt on you), and you also do it [. . .] And from the first day it is also clear that you are expected to enter the best universities. The [Instituto] Nacional was the door to go to Universidad de Chile. [. . .] There is a culture of success, academic above all. They make it clear that this is what matters.

Since the beginning of secondary school, Pablo was encouraged by schoolteachers and peers to pursue engineering at UCH. Instituto Nacional offered him a well-worn path not just to elite universities but also to a high-status occupation. Students trained at these institutions give their pupils a solid academic preparation, exposed them to much greater social diversity, and familiarised them with cultural norms more closely related to both meritocratic mobility and elite values. Pablo finished his secondary studies obtaining the maximum score in the math exam, allowing him access to university. When I asked him about his overall experience at secondary school and his achievement, Pablo briefly remarked, ‘it was something expected’. But he also adds, ‘Much of my friends and myself owe a great deal to [Instituto] Nacional [. . .] Being educated at that school changes your life’.

Finally, there is another way in which institutions act as powerful channels to access competitive employment for respondents. Prestigious universities can be indispensable to gain access to competitive employment opportunities. Javier Bernales, an engineer from PUC working at a renowned construction firm, underscores the role respected academic credentials have to open job opportunities:

If I had studied at a university that is not well valued, I simply think I would have not got the job. In Chile the university speaks more than me. When an employer sees my CV, what he or she sees is Universidad Católica before Javier Bernales. And for people like me, who do not have a lot of networks, that can make a difference.

Most respondents share a similar experience, though some of them also point out that prestigious credentials alone are not a guarantee of access or secure employment stability over time. Competition, at least at high-status occupations, is largely closed to students who were not trained at top universities – something research has confirmed elsewhere (Rivera, 2015). As Javier makes clear, recognised academic credentials backed by prestigious academic institutions are usually the chief asset students from disadvantages backgrounds have at their disposal to leverage in their favour when pursuing competitive job opportunities.

Being ‘in the right place at the right time’

In addition to effort and support, a third reason advanced by respondents highlights the role of luck in the explanation of their upward trajectories. For many of them, luck refers primarily to the recognition of contingent events in shaping informants’ lives. Luck thus provides another way in which respondents go beyond the mere notion of personal effort in their own understandings of their long-range upward mobility: recognising the role of luck is a way of explaining their upward trajectories or success by forces or events external to themselves – a view most accounts on meritocracy overlook (for an exception Frank, 2016). Luck appears not as a substitute of the efforts made and the support from which they benefitted, but rather *accompanying* them. Luck is primarily presented as the consequence of unplanned or unexpected experiences, actions and encounters that contributed to make a difference in their unlikely upward trajectories. The idea of being ‘in the right place at the right time’ (Naudet, 2012: 48–49) is widespread in their accounts. Carmen Soto, the doctor introduced earlier, makes reference to this idea of luck when explaining to me her application process to medicine at PUC:

In 1985, when I was applying to medicine, it was the year of the earthquake in [the place where she resided during her childhood]. The situation was pretty difficult. At the time, my dad had a very low salary as a hairdresser. So, in my application process [at PUC], they considered not just our economic situation, but also the fact that I was coming from a disaster zone after the earthquake. And I got 100 per cent of the credit to study medicine. That was the way I could study, really. I was very lucky, because that could have well not have happened at the same time I was applying.

For Carmen, luck played a part in her application to medicine at PUC by the conjunction of certain conditions tied to her family backgrounds (i.e. the low salary earned by his father) and the powerful but unexpected effects of random events (i.e. an earthquake). It is the highly unlikely conjunction of both factors that ultimately made the difference in her application, which she acknowledges by referring to luck.

Camila Galdames, a lawyer from UCH currently working at a renowned legal firm, underscores a similar conception of luck when explaining her success in the hiring process:

I was interviewed by a lawyer from Universidad de Chile who came from [low-income council]. So, I think she saw a lot of her in me when I went to that interview. This is why I am telling you that there is also a luck factor going on here. She was there and I got the job. We connected very well immediately, and she has guided me and put a lot of trust in me ever since.

In accounts like these, what becomes apparent is a notion of luck tempering the idea of a life trajectory strongly governed by a plan or design. For both Carmen and Camila, there is a clear recognition that life outcomes, as their own experience indicates to them, were not entirely predetermined or predictable, notwithstanding the efforts made and the support from which they benefitted along the way. Thus, contingency has an important part to play in their long-range upward trajectories. However, as Camila suggests, this does not mean that the role played by contingency is un-patterned. A ‘luck factor’ favoured her because the job interviewer had a similar social background and attended the same prestigious academic institution. This type of idea of luck and its acknowledgement is very common among respondents.

‘Being intelligent is never enough’

It is interesting to note how one of the main components of merit – intelligence – is downplayed by respondents. One way this downplaying of intelligence arises is expressed by Claudio Riquelme, an engineer trained at UCH, who relates his ‘intelligence’ to luck. In his words,

I had the luck that nature gave me some intelligence. I have been super conscious of this, which for me is a reason to remain humble, because I know it is a gift. It is not something that I did. It is something that I have and use, just that, you see? I am aware of having this ability, particularly with maths, for which I cannot really take credit.

Interestingly, by linking intelligence with luck in this way, the former acquires both a different meaning. According to Claudio, his intelligence is not something of his own making. His intelligence is a ‘gift’ given by ‘nature’, for which he cannot ‘take credit’. As such, Claudio does not think that this ability should lead to an accrued reward for himself, as the literature about meritocracy and upward mobility usually imply. Rather, for him, his intelligence is a driver towards humility.

However, Claudio’s specific form of downplaying intelligence is not widespread among respondents. The prevalent form of downplaying intelligence is closely tied to their prevalent awareness of the exceptional nature of their long-range upward

trajectories in the Chilean context. Alejandro Salinas, a lawyer trained at UCH, sheds important light on this:

I think I am intelligent. I was aware of that since I was little, you know, just by comparing yourself with other children of my age. But my experience in my life has also showed me that in this country being intelligent or talented is never enough. Perhaps elsewhere is different, but not in Chile, not really. There are many other things that count. Your surname, where you live, your networks [. . .] That is the way things are.

Importantly, in Alejandro's experience, ascribed features such as family name, residence or 'networks' still prevent individuals from rising due to talent alone (Núñez and Pérez, 2007; Zimmerman, 2019). As was common among respondents, the references to intelligence were also often accompanied by relating being smart to other factors which allowed their talents and abilities to flourish. This finding is consistent with recent research in the UK suggesting greater emphasis on effort or hard work over intelligence (e.g. Littler, 2018; Mendick et al., 2015; Miles et al., 2011), though discrepant with what is reported for India, France, and the US. In these societies, intelligence or talent is considered as the main 'causes' the long-range upwardly mobile underscore for explaining their trajectories (Naudet, 2012).

Conclusion

In this article, I have attempted to widen the geographical and methodological scope of the existing research on social mobility and meritocratic values by focusing on the Chilean case. In contrast to one-dimensional accounts of people's perceptions of inequality – an 'individualistic' versus a 'structuralist' pole – that dominates the survey-based research (e.g. Ellemers, 2001; Gugushvili, 2016; Jaime-Castillo and Mareques-Perales, 2014; Wegener and Liebig, 1995), my qualitative-based findings reveal a view of meritocracy emerging as part of a more complex, situated and interconnected web of meaning. Indeed, the way the upwardly mobile relate to meritocratic values is through reference to a multifaceted array of factors: mainly effort, different sources of support and luck. In particular, my findings reveal that families play a key role in shaping a collective framing of long-range upward mobility. Families, both nuclear and extended, have a crucial role for Chileans, not only in economic but also in emotional and moral ones (Araujo and Martuccelli, 2012).

My qualitative-based research also sheds light on the relationship between the expansion of a meritocratic ideology and the neoliberal restructuring in Chile. Despite the pioneering, radical and systematic neoliberal policies implemented over the past four decades (Harvey, 2005), my findings show how upwardly mobile people themselves do not only emphasise self-reliance, socioeconomic success and competitiveness – the main features of what Lamont et al. (2016) term the 'neoliberal self'. Even among respondents who take a more individualistic approach, their perceptions contain significant traces of appreciation for the support they have received and the role of luck in their achievements. Contrary to a simplistic understanding of social mobility in terms of individual achievement, my data conveys that the upwardly mobile hold complex and sometimes

competing worldviews simultaneously (Swidler, 1986). My findings thus suggest that the way these complex and competing attitudes are activated and/or expressed, the cultural frameworks to which they are linked, and the behaviours that follow from them are elicited by specific national and sub-national contexts, particular types of mobility trajectories, as well as by the data-collecting techniques used by researchers.

My findings bear conceptual, methodological and geographical, implications for the future study of social mobility and meritocratic values. Conceptually, they invite interrogation of meritocratic values based on a richer conception of social mobility. In line with previous research (Friedman, 2016; Friedman and Laurison, 2019), this should be based not only in terms of the *direction* involved (upwards or downwards), but also considering the *range* (the distance covered), the *speed* of movement and the specificities of occupational fields. Methodologically, studies should move beyond the survey-based research still dominating the field and include qualitative-based studies. The latter are vital to provide a more complex account of how the socially mobile relate to meritocratic values. Geographically, greater attention should be devoted to the study of Latin American societies and other under-researched regions of the world. This should greatly contribute to add and/or challenge the existing knowledge about the relationship between social mobility and meritocratic values in the US or European societies.

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Notes

1. In the Chilean context, a primary degree in education is granted upon completion of the first 8 years of compulsory primary education. A secondary degree is granted when the 4 years of secondary schooling are completed.
2. Informality, especially prevalent among the poor, currently reaches almost a third of the labour force (Henríquez, 2019).

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