

Michał Kubiak*

ORCID: 0000-0002-4231-8071

University of Gdansk

Universal Basic Income as a Tool of Social Policy in the Face of Experience from Selected Pilot Programs

**Bezwarunkowy dochód podstawowy
jako narzędzie polityki społecznej w obliczu doświadczeń
z wybranych programów pilotażowych**

Keywords: social policy, universal basic income, welfare state

Słowa kluczowe: bezwarunkowy dochód podstawowy, państwo opiekuńcze, polityka społeczna

Abstract

Pilot Unconditional Basic Income (UBI) programmes introduced in selected countries are analysed against the backdrop of relevant theoretical considerations. The aim of the article is to analyse the assumptions and results of the experiments conducted, especially in the context of questions about the possibility of its introduction as a potential replacement for a set of social policy instruments used by modern states. The considerations most often concern the impact it could have on public finances, the labour market or the level of well-being. The arguments of supporters and opponents of the UBI are also synthetically presented, as well as the challenges related to its potential implementation.

* Michał Kubiak, dr hab.; profesor w Instytucie Politologii, Wydział Nauk Społecznych, Uniwersytet Gdański; e-mail: michal.kubiak@ug.edu.pl

Streszczenie

Na tle rozważań teoretycznych w artykule scharakteryzowano programy pilotażowe dotyczące Bezwarunkowego Dochodu Podstawowego (BDP) wprowadzone w wybranych państwach. Celem artykułu jest analiza założeń i wyników przeprowadzonych eksperymentów, szczególnie w kontekście pytań o realia wprowadzenia w życie rozwiązania, jakim jest BDP i ewentualnego zastąpienia nim zestawu instrumentów polityki społecznej stosowanych przez współczesne państwa. Rozważania dotyczą między innymi wpływu, jaki mogłoby to mieć na finanse publiczne, rynek pracy czy poziom dobrobytu. Syntetycznie zaprezentowano również argumenty zwolenników oraz przeciwników BDP, a także wyzwania związane z potencjalnym jego wdrożeniem.

Assumptions and the aim of the article

As a result of the discussion on Unconditional Basic Income (UBI), questions arise about the possibility of launching it as a potential replacement for a set of social policy instruments used by contemporary states. The considerations most often concern the impact that the introduction of this type of benefit could have on public finances, the labour market, or the level of well-being. The aim of the article is to analyse the assumptions and results of UBI pilot programmes carried out in selected countries. In connection with the aim, the following research questions were asked: what were the characteristic features of UBI pilot programmes run in individual countries and what were the effects of their implementation? To what extent are the effects of UBI experiments helpful for their potential implementation in the context of the impact on the social and economic situation?

Assumptions and definitions of Unconditional Basic Income

Among the originators of the concept of basic income – (the first coherent concept) guaranteeing a certain amount of income for each (citizen) – Thomas More (the author of the famous *Utopia*) is most often mentioned, as well as Juan Luis Vives (the forerunner of care pedagogy and social work). In the further course of history, Francis Charles Fourier is also indicated as the progenitor of

the concept of universal basic income – as the creator of the “territorial dividend” due to everyone (the context of an unconditional money transfer for everyone)¹.

Unconditional basic income (UBI) is an amount paid by the state, at a fixed level and regularly, to every adult member of society. Its payment and level do not depend on whether the person is rich or poor, lives alone or with others, or is willing to work or not. It is granted not only to citizens but to all permanent residents. Moreover, the benefit payment is not dependent on any action by the beneficiary².

In foreign literature, the characteristics of guaranteed income appear in various approaches, namely, Universal Basic Income (UBI), Unconditional Basic Income (UBI), and Basic Income Guarantee (BIG). It is worth mentioning that guaranteed minimum income is a cash benefit paid under certain conditions³.

The unconditional basic income (UBI) is a certain approach in a social policy paradigm based on conditional monetary and non-monetary benefits. As one can expect, there are supporters and opponents of this idea that is largely related to the role of the state in the contemporary economy and social policy⁴. That is why we are witnessing a discussion on the subject of UBI in both foreign⁵ and Polish literature⁶. It is worth mentioning that in Poland, the idea of the minimum

¹ See more: G. Standing, *Dochód podstawowy. Jak możemy sprawić, żeby to się udało?*, Warszawa 2021, p. 20–30, 35–42.

² P. van Parijs, *A basic Income for All*, „Boston Review” 2000, No. 5, p. 4–8; access: <http://bostonreview.net/BR25.5/contents.html>, translated by R. Szarfenberg, p. 2, http://rszarf.ips.uw.edu.pl/pdf/BI_forall.pdf [access: 27.11.2024].

³ R. Szarfenberg, *Minimalny dochód gwarantowany (MDG), bezwarunkowy dochód gwarantowany (BDP), płaca minimalna (PM) – krótkie wprowadzenie*, http://rszarf.ips.uw.edu.pl/pdf/mdg_bdp_pm.pdf [access: 27.11.2024], a table on p. 4–5.

⁴ A. Niewiadomska, *Dochód gwarantowany utopia czy warunek realizacji koncepcji rozwoju sprzyjającego włączeniu społecznemu*, „Społeczeństwo i Ekonomia” 2018, No. 2, p. 47.

⁵ K. Widerquist et al. (eds.), *Basic Income: An Anthology of Contemporary Research*, Oxford 2013; M. Walker, *Free Money for All: A Basic Income Guarantee Solution for the Twenty-First Century*, New York 2016; P. van Parijs, Y. Vanderborght, *Basic Income: A Radical Proposal for a Free Society and a Sane Economy*, Cambridge–London 2017; B. Rogers et al., *Work, Inequality, Basic Income*, Boston 2017; J.R. Smith, *Basic Income Policy and National Debts: The Basic Blueprint for a Global Planned Economy Paperback*, CreateSpace Independent Publishing Platform 2017; L. Haagh, *The Case for Universal Basic Income*, Cambridge–Medford 2019; P. Nelson, *Universal Basic Income and the Threat to Democracy as We Know It*, Business Expert Press 2019; R.E. Wright, A. Przegalińska, *Debating Universal Basic Income. Pros, Cons, and Alternatives*, London 2022.

⁶ In 2014, a thematic issue (devoted entirely to unconditional basic income) of the journal „Praktyka Teoretyczna” was published 2014, Vol. 12, No. 2, <https://pressto.amu.edu.pl/index.php/prt/issue/view/72/86> [access: 02.09.2024]; T. Machelski, *Bezwarunkowy dochód podstawowy – refleksja prakseologiczna*, „Studia BAS” 2017, No. 2; G. Ciura, B. Kłos (eds.), *Polityka społeczna w Polsce*, Warszawa

guaranteed income in social assistance was written about as early as 1993, and it was defined at that time as: “a system of legal-organisational-financial solutions that gives a citizen the right to claim a minimum of means for his maintenance, which minimum is determined by the government, guaranteed by the state and financed from taxes. It is important that it is a legal term, and therefore is an entitlement”⁷.

Currently, the idea of universal basic income (UBI)⁸ comes down to providing all citizens with a modest (basic) and unconditional income, which they can supplement from other sources. Guy Standing, considered the originator of the modern concept of UBI, defines it as “a modest amount of money paid unconditionally to individuals on a regular basis”⁹. Philippe van Parijs describes it somewhat more broadly, although similarly, claiming that “a basic income is an income paid by a political community to all its members on an individual basis, without means test or work requirement”¹⁰. In turn, according to the definition proposed by the Basic Income Earth Network (BIEN), basic income is (synthetically) characterised by five features: periodicity (paid at regular intervals); monetary form (paid as cash, and not, for example, as a benefit in kind); individuality (paid to each person, not to households); universality (paid regardless of income and assets); unconditionality (without requirement to work or be willing to accept a job offer)¹¹.

Reasons for interest in introducing UBI

One of the reasons for the broader interest in the concept of unconditional basic income is the potential threat of losing one's livelihood by people who are pushed out of the labour market by globalisation and/or robotisation. There are concerns that the development of automation may result in human labour becoming

2017, p. 93–106; M. Szlinder, *Bezwarunkowy dochód podstawowy. Rewolucyjna reforma społeczeństwa XXI wieku*, Warszawa 2018; P. Kukołowicz, R. Szarfenberg, R. Trzeciakowski, *Bezwarunkowy Dochód Podstawowy. Nowy pomysł na państwo opiekuńcze?*, Warszawa 2020; G. Standing, op.cit.

⁷ T. Szumlicz, *Minimalny dochód gwarantowany w polityce społecznej*, Warszawa 1993, p. 13–14.

⁸ A concise description against the background of definitional dilemmas is presented by G. Gołębiowski, *Powszechny dochód podstawowy – argumenty za i przeciw*, „Studia Ekonomiczne. Zeszyty Naukowe Uniwersytetu Ekonomicznego w Katowicach” 2017, No. 334, p. 35–36.

⁹ G. Standing, op.cit., p. 13.

¹⁰ P. van Parijs, *Basic income: A simple and Powerful Idea for the Twenty-First Century*, “Politics & Society” 2004, No. 32 (1), p. 7–39, <https://journals.sagepub.com/doi/10.1177/0032329203261095> [access: 9.10.2024].

¹¹ *About Basic Income*, <https://basicincome.org/about-basic-income/> [access: 2.12.2024].

less necessary, and in the future, this process will gain even more momentum. Interestingly, among the supporters of this approach are some CEOs of international corporations, including Bill Gates, Mark Zuckerberg and Elon Musk who is convinced that automation will eventually lead to the introduction of UBI. Although according to Bill Gates, it is still too early to put this concept into practice, he claims that “over time, countries will be rich enough”¹².

In this context – in a broader perspective of the future – the question arises whether we must fear robotisation and automation and seek new forms of income redistribution. What would be the advantage of a solution such as UBI is its simplicity (e.g. reduction of costs related to the need to provide many documents – bureaucracy and the size of the so-called service-providing administration – due to the need for control) and *de facto* replacement of many different benefits previously used/received (as tools of social policy)¹³. In principle, UBI would reduce the sphere of poverty, as well as the level of social inequality in a broader sense. In the case of people who lost their jobs due to automation, UBI would act as a kind of “safety cushion” in terms of income (minimum level of social security). On the one hand, this could have an impact on the potential improvement of the position of people looking for work (no need to accept a job offer that does not fully meet the jobseeker’s aspirations). Therefore, having a certain minimum financial base for survival, people could focus more on finding a better job and/or allocate a certain amount of time to individual development, acquiring new skills or starting their own business (thus in this context, UBI could support entrepreneurship). In addition to the above-mentioned advantages of UBI, supporters also point out that such a solution significantly stimulates demand in the economy and reduces the uncertainty of tomorrow¹⁴. Among the justifications for the need to introduce UBI, attention is drawn to the accumulating problems of welfare states and changes towards workfare, as well as the issue of the growing precariat group (emerging in the context of increasing the flexibility of labour markets and changes in the social policy of welfare states) and the

¹² A. Turek, *Założyciel Facebooka za gwarantowanym dochodem podstawowym. „Obecnie praca oznacza niepewne zajęcie”*, <https://businessinsider.com.pl/finanse/gwarantowany-dochod-podstawowy-w-usa-zdanie-chrisa-hughesa/qnqqp70> [access: 2.12.2024].

¹³ For example, according to estimates, introducing UBI in Poland at the level of PLN 1,200 per month (for people of working age and PLN 600 for people of pre-working age) would cost PLN 376 milliard, while – for comparison – total expenditure on social security and assistance in 2018 amounted to PLN 343 milliard (PLN 229 milliard – total pensions, annuities and PLN 54 milliard for benefits for children and families); see: P. Kukołowicz, R. Szarfenberg, R. Trzeciakowski, *op.cit.*, p. 6–7.

¹⁴ *Ibidem*, p. 42–44.

general weakening of social security. For the precariat group, introducing UBI would mean no need for permanent employment and a stable source of income allowing for the satisfaction of basic needs¹⁵. As a result, UBI would play the role of an incentive for people to start reaching for more in the future. As Guy Standing, an advocate of UBI, claims, “People who have a basic sense of security work more, not less. They are more motivated, and they do not fall into poverty traps. A guaranteed income increases the willingness to take up employment”¹⁶. As far as financing UBI is concerned, Standing recommends the creation of a state fund that would collect and pay out this allowance from money collected from taxes on rental income from property, including copyrights and patents and others¹⁷. As Grzegorz Gołębiowski points out, “there are also ideas for taxing pollution emissions, financial transactions, land ownership, excessive wealth or income taxes. It is also proposed to tax machines replacing human labour or foreign direct investments, mainly in order to reduce outsourcing and limit strategies based on social dumping”¹⁸. Generally, among the sources of financing UBI on a national scale, taxes and redirecting expenditure from other benefits (which would then be terminated) and public debt are mentioned – however, at the conceptual stage it is difficult to make a decision on the details (this would undoubtedly have serious consequences for the economy).

On the other hand, there are also arguments from sceptics who express a critical attitude towards UBI. The most serious ones are connected, in particular, with concerns about the high costs of implementing such a solution and the negative impact on the labour market. Firstly, it concerns high expenditure from the central budget, and secondly, fears are expressed about excessive “handouts”. The latter issue is directly related to the controversy over the potential weakening of motivation to work and linking this to a decline in productivity in a broader perspective. If this happens, the question arises of who and how will generate wealth as a source of financing for the system. It may mean rising wage pressure for employers, and on the other hand, the employees may be less motivated to work. In turn, tax progression will translate into the fact that the burden will apply to both employers and employees.

¹⁵ M. Szlinder, op.cit., p. 119–156.

¹⁶ Ł. Pawłowski, J. Chodorowski, *Dochód dla wszystkich? Stać nas na to!* „Kultura Liberalna” 2017, No. 3, <https://kulturaliberalna.pl/2017/01/24/guy-standing-dochod-gwarantowany-wywiad/> [access: 2.12.2024].

¹⁷ Ibidem.

¹⁸ G. Gołębiowski, op.cit., p. 36.

Arguments about the progressing globalisation and its impact on the automation of jobs have been cited for a long time and enjoy constant interest¹⁹. From this perspective, it often turns out that the decline of jobs that automation contributes to is related to the creation of new – often more pleasant – professions. Therefore, on the one hand, it contributes to the reduction of jobs, but on the other hand, it also leads to their generation. In this context, concerns about unemployment resulting from robotisation and globalisation seem debatable. Moreover, not all professions are equally susceptible to automation. In the past century, technological progress created more jobs than it eliminated and the increase in society's wealth boosted the demand for services (including more luxurious ones) and jobs in this sector.

Among the controversies related to UBI, another issue is related to the real impact on increasing the level of immigration to countries offering its highest level (potential danger of economic migration “for a higher UBI”). Such events could translate into an increase in the contribution and tax burden on those who work and produce national income and threats to the public finances of the (chosen) country.

Experiences from pilots – the realities of operation

Despite the fact that the idea of UBI has been known for a relatively long time, no country has yet decided to introduce it in its pure form. So far, we have dealt only with tests/experiments in the form of pilot programmes (more or less similar to the model approach). However, pilot experiments related to UBI carried out in several countries around the world arouse ambivalent feelings. Some of the first ones carried out in Canada and the United States were in fact modelled on the so-called negative income tax (NIT)²⁰, which is a similar but not identical solution to UBI²¹. Nevertheless, it is worth analysing both these and several other

¹⁹ M. Carnoy, *Utrwalanie nowej gospodarki: praca, rodzina i społeczność w wieku informacji*, Toruń 2002; D. Susskind, *Świat bez pracy. Jak technologia i automatyzacja zmienia nasze życie i jak powinniśmy na to zareagować*, Warszawa 2022.

²⁰ See more: K. Górka, M. Łuszczczyk, M. Thier, *Ujemny podatek dochodowy jako neoliberalne rozwiązanie dla polityki społecznej*, „Barometr Regionalny” 2016, Vol. 14, No. 4, p. 65–72.

²¹ The concept of negative income tax has been used since the 1940s. It concerns the possibility of subsidising the lowest earners who are not entitled to unemployment benefits. It was designed to be applied in a situation where tax reliefs are not sufficient to ensure the social minimum. The general economic justification for this concept was primarily the fact that such allowance was less expensive for the state than an unemployment benefit, cited in: T. Machelski, *op.cit.*, p. 96.

solutions in this area, because they provide a certain overview and a sample of the potential operation in practice.

In Canada, a field experiment with the annual basic income, MINCOME, was conducted in Dauphin, Manitoba, from 1974 to 1979. The strategic goal of the project was to determine whether guaranteeing an income to citizens would reduce productivity. However, the entire experiment ended without an in-depth analysis of the results or a final report. Only the analysis by economist Evelyn Forget²² (published in 2011) shed new light and showed that noticeable declines in employment rates were found in only two groups (mothers spent more time with their children, and teenagers devoted more time to studying and further education). In addition, the studies also found the elimination of poverty, an increase in graduation rates, and an improvement in public health – signalling the social benefits of providing individuals with the material means to live freely. Basic income seemed to have a positive impact on the physical and mental health of residents, including a decline in doctor visits, a decrease in hospitalisations (by 8.5%), and an improvement in high school graduation rates. The challenge with these studies, however, is that the people taking part knew that basic income was a temporary policy. As a result, the number of hours worked in Dauphin fell only slightly, not significantly. If beneficiaries had quit their jobs or worked significantly fewer hours, they would have been unemployed or had a lower standard of living after the basic income was abolished in 1979. However, the “MINCOME” project, jointly funded by the provincial and federal governments, which were not prepared to increase the funds, was cancelled after four years when the government changed.

The second Canadian project implemented in Ontario from 2017 provided for the payment of a basic income for three years to 4,000 people (including in Hamilton, Brantford and Brant County) regardless of whether they had a job or not. Beneficiaries received a monthly basic income (up to 17,000 Canadian dollars per year for a single person and 24,000 dollars for a couple). In return, they had to regularly fill out surveys and agree to participate in a research project to determine whether it would be possible to introduce permanent payments in the future. However, after the change of government led by Ontario Premier Doug Ford from the Progressive Conservative Party in 2018, the project was cancelled

²² E.L. Forget, *The Town with No Poverty: The Health Effects of a Canadian Guaranteed Annual Income Field Experiment*, “Canadian Public Policy” 2011, Vol. 37, No. 3, p. 294–300, <https://utppublishing.com/doi/pdf/10.3138/cpp.37.3.283> [access: 2.12.2024].

(although formally it was still several months away from completion). The government claimed, first, that the programme discouraged participants from looking for jobs, and second, it pointed to the high costs of its operation²³. Government representatives believed that “the programme did not help people become independent contributors to the economy, and it was a disincentive to get people back on track”²⁴. It is also worth adding that in connection with this decision, four programme participants filed a class action lawsuit against the government in connection with the breach of contract (the government withdrew from its election promise)²⁵. The main aim of the pilot in Ontario was to test the impact of the annual guaranteed income on employment and its results in terms of various measures of general well-being. The programme was active for a shorter time than expected – thus, not long enough to collect comprehensive evaluation data. However, among the results, it was noted that young people were less likely to drop out of school, while little changed in terms of hours worked by people employed full-time (in the case of mothers with small children and students, the time spent on paid work decreased, in exchange for which they could focus on studies and care for small children). In addition, many beneficiaries reported improved physical and mental health, food security, housing stability, financial well-being, and better social relations, changing their standard of living, and increased self-esteem and hope for a better future. Several interviewees had only marginal links to the labour market because of disabilities and other health problems. Receiving a basic income did not lead many of these people to work more. However, these types of participants generally reported better health and well-being. They found it easier to pay off existing debts, improve their nutrition, and participate more in their communities²⁶.

In the United States, there have been several experiments with basic income, but most of them were short-lived and relatively small-scale. In the years 1968–

²³ M. Koška, *Ontario niespodziewanie rezygnuje z dochodu gwarantowanego. Ludzie czują się oszukani*, <https://www.money.pl/gospodarka/wiadomosci/arttykul/ontario-niespodziewanie-rezygnuje-z-dochodu,122,0,2412666.html>, 5.08.2018 [access: 27.01.2024].

²⁴ D. Mitchell, *Resolution in \$200M Ontario basic income class action take “years”: lawyer*, <https://globalnews.ca/news/10443912/ontario-basic-income-class-action/> [access: 15.09.2024].

²⁵ *Class action lawsuit filed over cancelled basic income project*, <https://www.cbc.ca/news/canada/hamilton/class-action-lawsuit-filed-over-cancelled-basic-income-project-1.5075897> [access: 27.01.2024].

²⁶ M. Ferdosi et al., *Southern Ontario's Basic Income Experience*, Hamilton 2020, <https://macsphere.mcmaster.ca/bitstream/11375/28173/1/southern-ontarios-basic-income-experience.pdf> [access: 15.09.2024].

–1974, such experiments were carried out in the states of New Jersey, Pennsylvania, Indiana (the town of Gary), North Carolina, Iowa and Colorado (Denver). In general, the money transferred under the programme turned out to be beneficial for the recipients, but there was a tendency to slightly reduce the number of working hours and the amount they earned. As noted above, these were solutions in their form closer to a negative income tax (NIT) than to an unconditional basic income (UBI).

The system closest to a pure UBI was implemented in Alaska. Since 1982, the authorities have been giving every Alaskan an annual check – a benefit financed from the so-called resource dividend. The amount of the benefit varies from about USD 2,000 per person when oil prices are high to USD 1,000 when oil is cheaper. The money comes from the Alaska Permanent Fund (APF) – a special investment fund financed from revenues from resource extraction²⁷. It turns out that the payment (dividend) had no significant impact on total employment. However, there was an increase in part-time employment, working hours were shortened, which was compensated by higher expenses, which allowed companies to hire more people, while employment fell in companies that sold goods outside Alaska, and therefore did not benefit from the fact that their customers (suddenly) had more money²⁸. In this light, there seems to be little evidence that giving people a certain amount of cash prevents them from working altogether (does not significantly reduce total employment) or makes them work significantly less. There are some concerns, however, namely that the APF on which these benefits are based is generally money derived from natural resources (taxation or royalties on natural resources), which are in limited supply. In practice, Alaska deposits at least 25% of the state's natural resource royalties – the income the state generates from its mines, oil, and gas reserves – into the fund each year. The money is then invested by the Alaska Permanent Fund Corporation in U.S. and foreign stocks, bonds, private equity funds, and other instruments, and the interest is then distributed to Alaskans²⁹. It is worth noting another controversial

²⁷ D. Matthews, *The amazing true socialist miracle of Alaska Permanent Fund*, 13.02.2018, <https://www.vox.com/policy-and-politics/2018/2/13/16997188/alaska-basic-income-permanent-fund-oil-revenue-study> [access: 2.12.2024].

²⁸ D. Jones, I. Marinescu, *The Labor Market Impacts of Universal and Permanent Cash Transfers: Evidence from the Alaska Permanent Fund*, "American Economic Journal: Economic Policy" 2022, Vol. 14, No. 2, p. 315–340.

²⁹ R. Sundlee, *Alaska's universal basic income problem*, <https://www.vox.com/future-perfect/2019/9/5/20849020/alaska-permanent-fund-universal-basic-income> [access: 2.12.2024].

phenomenon: the APF has become an important part of the electoral game, i.e. promises related to higher payments to citizens. This allowed one candidate for governor to focus the election campaign largely on this one issue (“Do you want a bigger check or not?”) and was used to generate political capital. The Alaska situation shows that UBI policies can have a significant impact on the economy, but they can also overshadow all other government issues and dominate politics, becoming a significant bargaining chip in the power struggle³⁰. Thus, this interesting case allows us to examine not only the social and economic consequences, but also the effects seen in the political arena.

Another programme in the USA concerns the Cherokee tribe (Eastern Band of Cherokee Indians Casino Dividend) in North Carolina. In 1997, the Cherokee tribe opened a casino in the reservation, and the leaders decided to distribute half of the profits to all members of the tribe (without any strings attached). Each person receives an average of \$4,000 to \$6,000 per year (which is about 20% of the additional budget for the average household). It was noticed that as a result of receiving these additional funds, people did not work less, but the level of education and mental health improved, and there was a decrease in the level of addiction (mainly to alcohol and drugs), as well as crime. On the other hand, children from families receiving this type of support did better at school and were less likely to have emotional disorders³¹.

In 2019–2021, Stockton, California, implemented a 730-day, USD 3 million project (funded by individual philanthropy and foundations). The study involved 331 people (including 133 UBI recipients) living at or below the median income (USD 46,033). Almost half of them worked full- or part-time and received USD 500 per month. The funds were transferred to a debit card so researchers could see what they were primarily spent on. However, 40% of the funds were paid out in cash, so researchers had to rely on recipients’ self-reports about how they actually used the money. They found that recipients spent the money primarily on food (40%), clothing and goods (24%), utilities (11%), and car repairs and petrol (9%)³².

³⁰ Ibidem.

³¹ R. Akee et al., *How Does Household Income Affect Child Personality Traits and Behaviors*, “American Economic Review” 2018, Vol. 108, No. 3, p. 775–827, <https://www.aeaweb.org/articles/pdf/doi/10.1257/aer.20160133> [access: 2.12.2024].

³² S. Samuel, *A California city gave some residents \$500 a month, no strings attached. Here’s how they spent it*, <https://www.vox.com/future-perfect/2019/10/8/20902839/universal-basic-income-stockton-trial> [access: 2.12.2024].

Also in the USA, Y Combinator company conducted a three-year pilot experiment based on UBI – one of the largest in history. The whole undertaking is better known as the Sam Altman experiment, and the results of the research were published in mid-2024³³. As part of the experiment, USD 1,000 per month was provided to 1,000 people aged 21–40 living in Texas and Illinois (and USD 50 per month to 2,000 people from the control group). The results of the experiment turned out to be very interesting – especially in the context of the impact on labour supply. According to the researchers, no evidence was found of a significant reduction in the overall labour supply. They indicated a decrease in the number of workers from the following categories: the elderly, the sick, the disabled, women with small children or young people who continued their education. However, it was emphasised that these diminutions did not reduce the overall supply, because it was largely offset by an increased supply from other members of the community. The researchers concluded that “the evidence shows that UBI is not only an effective instrument to reduce poverty and inequality and improve social welfare, but it is also sustainable in relation to employment”³⁴. The higher someone’s income from work, the more likely they are to reduce their working hours, and those with the lowest incomes were the least likely to reduce their working hours (it should be added that in this pilot all other social benefits were maintained). There was no reduction in employment among those who had no children or were over the age of 30. The diminution in employment was significant only in the case of single parents taking care of their children, or for those aged 21–30, many of whom were in college or vocational training. In addition, drug and alcohol abuse decreased (especially among men), people moved to places they preferred as a better location to live, and many women escaped from abusive relationships. Thus, the data in this case did not confirm fears of a slump in employment, although the pilot did show a small decline in employment among parents and young adults.

A factor influencing employment while receiving a basic income is that it can potentially have a positive impact on entrepreneurship. Considering in particular the experience from the pilot projects presented above, it is worth noting how

³³ S. Santens, *Did Sam Altman’s Basic Income Experiment Succeed or Fail?*, <https://www.scottssantens.com/did-sam-altman-basic-income-experiment-succeed-or-fail-ubi/?ref=scott-santens-newsletter> [access: 4.12.2024].

³⁴ M.A. de Paz-Báñez et al., *Is There Empirical Evidence on how the implementation of a Universal Basic Income (UBI) Affects Labour Supply? A Systematic Review*, “Sustainability” 2020, Vol. 12, No. 22, p. 20, <https://www.mdpi.com/2071-1050/12/22/9459> [access: 2.12.2024].

the situation develops in developing economies. Among them, the largest and longest experiment with UBI in the world was launched in Kenya. The charity *GiveDirectly* distributes payments there to 23,000 people scattered across 295 villages (195 study villages and 100 control villages)³⁵. As part of this study, which began in 2016 (with a global value of USD 30 million), beneficiaries receive an amount of USD 0.70 to USD 1.10 per adult per day (delivered monthly for 12 years). It turned out that cash transfers in Kenya were good for the economy and brought benefits not only to the recipients themselves but also to people in nearby villages. Recipients spent more money, some of which went to neighbouring businesses. Contrary to fears, there were no significant inflationary effects and no signs of envy or jealousy. Short-term assessments showed that the recipients' lives improved significantly: hunger fell sharply and they were better fed (more dietary diversity), investment and income from agriculture and small businesses increased (which may suggest that the transfer promoted economic growth), ownership of valuable assets such as iron roofs and livestock increased, and recipients were more satisfied in many respects. There was essentially no change in hours worked but recipients moved into self-employment (a reduction in hours of paid employment – all in agriculture, but a slightly larger increase in self-employment outside agriculture). In addition, the 12-year guarantee of receiving the UBI encouraged saving and risk-taking³⁶. In general, the regional economy expanded, and both the recipients and non-recipients were better off because the transfers enabled spending that helped their employers and their own businesses. There was no significant influence on the psychological well-being of non-recipients. The estimated effect was indeed positive, but not very significant³⁷.

In India, a pilot UBI experiment was conducted in Madhya Pradesh (the poorest state in the country) in 2011–2012. Twenty similar villages were selected and 5,547 people (8 villages) were included in the programme, while another 5,684 people constituted a control group (12 villages). The members of the first group received a monthly basic income for 18 months, which was about a 30% increase in income for an average family with five children. The project was coordinated by the Self-Employed Women's Association, funded by the United Nations

³⁵ <https://www.givedirectly.org/ubi/> [access: 5.12.2024].

³⁶ *Early findings from the world's largest UBI study* (6.12.2023), <https://www.givedirectly.org/2023-ubi-results/> [access: 5.12.2024].

³⁷ D. Matthews, *A charity dropped a massive stimulus package on rural Kenya — and transformed the economy*, <https://www.vox.com/future-perfect/2019/11/25/20973151/givedirectly-basic-income-kenya-study-stimulus> [access: 5.12.2024].

International Children's Emergency Fund (UNICEF) and covered two studies. In the first, every man, woman and child in eight villages received a monthly payment: 200 rupees for adults and 100 rupees for each child (paid to the guardian). After a year, the payments increased to 300 and 150 rupees, respectively. At the same time, 12 similar villages (functioning as a control group) did not receive any basic income. Among the comparative results, one could notice, among others, a positive impact of additional income on economic activity – people who have guaranteed social security are more economically active (forms of economic activity: buying animals and agricultural equipment, as well as developing cooperatives). In the results it was stated that receiving a basic income also helped to pay off debts, led to improved sanitary conditions, better nutrition, reduced alcohol consumption and boosted attendance at schools (as well as purchases related to children's education: books, equipment, tutoring, etc.). In addition, the experimental group noted an increase in the level of professional activity – the total number of working hours (as a sum of hired work, self-employment and household work) grew. Livestock and machinery needed for cultivating the land were also purchased³⁸.

One of the most frequently cited practical solutions for basic income is the project implemented in Finland in 2017–2018 (which met with huge international interest and its total investment amounted to over EUR 20 million). It was launched during the term of office of the liberal-conservative government of Prime Minister Juha Sipili. The Finnish programme covered 2,000 people aged 25–58 and was available to unemployed people, although taking up a job did not reduce the amount of money paid each month (beneficiaries received 560 euros each month regardless of other income and, for example, of whether they were actively looking for a job).

As it turned out, this income did not help beneficiaries find a job but it made them feel happier and less stressed, and they expressed greater trust in other people and state institutions (e.g. police and courts) than before receiving the basic income. However, the benefit in its adopted form did not attain the intended goals, so the authorities made a decision about its termination and the process was completed in 2018. According to a report by the Finnish Ministry of Health and Social Affairs and the Finnish Social Insurance Institution (KELA), the basic income experiment conducted among the unemployed “did not increase employment, but the recipients of the benefit experienced a better quality of life

³⁸ S. Davala et al., *Basic Income: A Transformative Policy for India*, London 2015.

than those in the control group”. The report shows that during the first year of the experiment, the basic income recipients worked “on average half a day longer” than people in the comparison group (people from both groups worked on average about 49 days a year). The researchers found that “the experiment participants had fewer symptoms of stress, as well as fewer health or concentration problems than the comparison group. They also admitted that they believed more strongly in their future and social opportunities”³⁹. Thus it was observed that thanks to this people were less stressed – individuals receiving basic income claimed that their health improved, their stress level decreased and their life satisfaction increased but the money did not encourage them to be more active in the labour market (it did not change the behaviour of the unemployed in the labour market), which was the main goal.

The study found no significant differences in the behaviour of the two groups on the labour market. However, it seems that the basic income had a slightly different effect on the different groups: for example, for families with children (receiving the basic income) – employment rates improved significantly, while there was no such big increase among those who did not have a family to support. Although these are the final results of the study, the Finns emphasise that “the results for the different groups are still uncertain due to the small number of observations”.

Differences between the studied groups appeared primarily in terms of well-being. People receiving basic income were much more satisfied with their lives (improved mental well-being, lower stress levels, less prone to depression, more confident about their future and higher levels of optimism about the stability of their own economic situation were observed). The study has provoked mixed reactions in Finnish society. Opponents of the study point to numerous shortcomings. They emphasise, first of all, that it was conducted only on unemployed people, so it is not known how it would change the well-being of people who are permanently employed and the basic income would be a supplement for them. Critics of the experiment also point out that it cannot be reliable due to the too small sample of respondents and too short duration of the measurements, as well as its basic focus on promoting employment⁴⁰. The venture *de facto* con-

³⁹ A. Zygiel, *Dochód gwarantowany w Finlandii. Pierwsze wyniki pilotażu*, https://www.rmfm24.pl/fakty/polska/news-dochod-gwarantowany-w-finlandii-pierwsze-wyniki-pilotażu,nId,2825722#crp_state=1 [access: 2.12.2024].

⁴⁰ Ł. Gadzała et al., *Finlandia publikuje ostateczne wyniki eksperymentu z dochodem podstawowym*, <https://www.euractiv.pl/section/praca-i-polityka-spoeczna/news/dochod-podstawowy-finlandia-guy-standing-helsinki-zus/> [access: 2.12.2024]; M. Szlinder, op.cit., p. 250–251.

cerned a (partial) basic income (aimed at unemployed people) – rather than an unconditional basic income. In addition, no baseline study was conducted to analyse changes occurring during the experiment. It is therefore not possible to determine whether the positive results (in terms of higher subjective well-being) can be attributed to basic income⁴¹.

The Finnish government conducted the experiment to see whether improving financial incentives would lead to increased employment. The experiment was primarily designed to investigate how the social security system could be reshaped in a way that promoted active participation and gave people stronger incentives to work. In this respect, it did not generate more working hours or higher incomes – recipients did not have more working days or higher incomes than the control group. Although the basic income recipients had better enticements to work, there were no statistically significant differences between the groups. In contrast, the Finnish government was not interested in improving the well-being of the people taking part in this procedure.

According to most Finnish political parties, such an income could be implemented, but at the same time, it could be dependent on, for example, active job search or participation in employment promotion programmes. The idea of an unconditional basic income is supported by, for example, the Greens (VIHR) and the Left Alliance (VAS), oscillating around the amount of 600 to 800 euros per month. In their opinion, such a benefit would replace various types of allowances, e.g. for the unemployed, housing, childcare, or education⁴².

In Germany, the non-profit organisation “Mein Grundeinkommen” (My Basic Income) from Berlin contributed significantly to the promotion of the UBI idea. It used crowdfunding to organise a basic income lottery. By the end of 2019, almost 500 basic incomes were awarded to applicants from all over the world. Each received around 1,000 euros per month for a year. During the evaluation of the programme, 80% of its beneficiaries said that this income made them less anxious, more than half said that it enabled them to continue their education, and 35% felt more motivated at work⁴³. However, due to the limited duration of

⁴¹ H. Hiilamo, *The basic income experiment in Finland yields surprising results*, <https://www.helsinki.fi/en/news/fair-society/basic-income-experiment-finland-yields-surprising-results> [access: 5.12.2024].

⁴² A. Zygiel, *Dochód...*

⁴³ J. Hotz, *What happens when people win this basic income raffle? They have time to find meaning in their life*, <https://www.fastcompany.com/90436425/what-happens-when-people-win-this-basic-income-affle-they-have-time-to-find-meaning-in-their-lives> [access: 3.12.2024].

the programme and payments (one year), this effect cannot be compared with long-term support.

Another German experiment using a solidarity basic income – tested in Berlin (from mid-2019) ended unsuccessfully in terms of achieving its goal. This voluntary project aimed to create 1,000 jobs – each subsidised for five years by the Berlin authorities (allocating 200 million euros for this purpose) and the federal government. The idea was to provide employment for people who had been unemployed for many years and to pull them out of their long-term dependence on social benefits. Out of 1,000 potential recipients, only 48 people found a job (by January 2020)⁴⁴.

Heiner Flassbeck, former Secretary of State in the German Ministry of Finance, who is also the co-author of a book on guaranteed income spoke negatively about UBI⁴⁵. In his opinion, introducing a UBI would cost twice as much as the state's tax revenues. If it were truly unconditional, taxes would have to be raised three times and many other consequences would have to be suffered, the costs of which are difficult to calculate. Another argument of critics of unconditional income in Germany is that the state would lack economic power. Formally, people would be able to work one-third less and if all people worked that much less, it would be difficult to maintain the economic power with which Germany could finance this model. In turn, if taxes were raised, there would be a fear of more work in the grey economy.

In 2016, in Switzerland – a country with a long tradition and an important role of direct democracy, the proposal to introduce the UBI was rejected in a referendum. According to the idea of Swiss scientists, every citizen was to receive 2,500 francs a month – regardless of income, financial or family situation (including children – for minors, the amount was set at 625 francs a month). However, on 5 June 2016, in a referendum on an amendment to the constitution introducing the UBI, Swiss citizens rejected the idea of introducing such a programme (with 76.9% voting against it and 23.1% voting for it, while the turnout was 46.4%). It should be added that the costs of the entire potential solution related to the introduction of the UBI were estimated at 200 milliard Swiss francs, with 3/4 of the financing coming from taxes and the rest from the social security

⁴⁴ *Solidarny dochód podstawowy. Projekt okazał się fiaskiem*, <https://www.money.pl/gospodarka/solidarny-dochod-podstawowy-projekt-okazal-sie-fiaskiem-6464431051806337a.html> [access: 27.01.2022].

⁴⁵ H. Flassbeck et al., *Irrweg Grundeinkommen. Die große Umverteilung von unten nach oben muss beendet werden*, Frankfurt am Main 2012.

system. However, the Swiss cited not only high costs as an argument but also fears that the labour market would suffer from such a reform (instead of work, living off state money). Swiss citizens considered the solution utopian, expensive and disadvantageous for the economy⁴⁶.

In turn, in Poland, 87% of respondents have little knowledge of UBI (57% do not know this solution, and 30% have heard of it, but do not follow the discussion on this topic). According to the research, 51% of people (aged 18–64) would support the introduction of UBI – including 24% who express strong support⁴⁷. UBI is most often supported by people aged 18–24 (60%), people with education below secondary level (70%) and those who do not have a permanent source of income – they take care of the household (75%) or are unemployed⁴⁸.

In Poland, the UBI is discussed mainly by experts, although public opinions and controversies also appear⁴⁹ – especially in the context of the planned pilot programme. The project of experimental implementation of a two-year unconditional basic income was prepared for the Warmińsko-Mazurskie Voivodeship (in its northern areas, 10 municipalities with the highest unemployment rates). The UBI scheme was accepted by the provincial authorities and entered into the regional strategy of the Association of Warmińsko-Mazurskie Border Municipalities. Initially, it was assumed that each resident (from 5,000 to 31,000 people) participating in the experiment would receive PLN 1,300 monthly regardless of their life situation⁵⁰. Over time (until 2024) and due to inflation and higher living

⁴⁶ A. Gruszczyńska, *Referendum w Szwajcarii: odrzucono pomysł dochodu gwarantowanego*, <https://wyborcza.biz/biznes/7,179195,20190586,referendum-w-szwajcarii-odrzucono-pomysl-dochodu-gwarantowanego.html?disableRedirects=true> [access: 3.09.2023]; *Szwajcarzy przeciwko dochodowi gwarantowanemu*, <https://www.money.pl/gospodarka/wiadomosci/arttykul/szwajcarzy-przeciwko-dochodowi-gwarantowanemu,94,0,2098526.html> [access: 3.09.2023].

⁴⁷ Opinions, however, vary depending on the amount of the potential UBI benefit and the method of its financing (30% support if it involved a significant increase in taxes, 28% support if financing required the abandonment of some social benefits and services, 24% support if financing was connected with an increase in Poland's debt); see: P. Kukołowicz, R. Szarfenberg, R. Trzeciakowski, op.cit., p. 5, 7, 25–35.

⁴⁸ In general, having a stable source of income does not favour support for UBI. 48% of working people and 44% of people receiving a pension support the introduction of such a solution; see: *ibidem*, p. 30–33.

⁴⁹ M. Krawiel, „Komunizm, demoralizowanie ludzi”. *Polski eksperyment jeszcze się nie zaczął a już oburza [opinia]*, <https://www.money.pl/pieniadze/komunizm-demoralizowanie-ludzi-polski-eksperyment-jeszcze-sie-nie-zaczal-a-juz-oburza-opinia-6772282260503520a.html> [access: 2.12.2024].

⁵⁰ A. Zygiel, 1300 zł „za nic”. *W Polsce ruszą testy bezwarunkowego dochodu podstawowego*, <https://www.rmfm24.pl/ekonomia/news-1300-zl-za-nic-w-polsce-rusza-testy-bezwarunkowego>

costs, this amount was to be higher⁵¹. Initially, the unconditional basic income was to be financed from EU and/or government funds (the costs of the pilot programme were set at PLN 156 million for 5,000 people, and PLN 970 million for 31,000). However, after the European Commission unblocked the funds from the National Recovery Plan for Poland, there are no obstacles to financing social projects from this source. Therefore, it is very likely that in Poland, the delayed pilot regarding testing UBI will eventually take place and only then – on the basis of studies – will it be possible to draw conclusions.

Selected pilots of the guaranteed income have given us mixed results and are not very convincing. This is particularly true for rich countries, where the effects of the guaranteed income are less clear. The previous pilot experiments on UBI in Canada and the USA mainly concerned the negative income tax (NIT). However, they painted a picture of some patterns and assumptions. In Canada, the decline in employment was noted among infants' mothers and teenagers who devoted more time to further education. The additional income was conducive to improving physical and mental health, food security, housing stability, financial situation and social relations, increased self-esteem and hope for a better future. However, little changed in terms of hours worked by full-time employees (in the case of mothers with small children and students, the time spent on paid work decreased) – and the aim of the programme was to test the impact of the annual guaranteed income on employment and its outcomes in terms of various measures of general well-being. It turned out that beneficiaries were more able to pay off debts, improve their nutrition and participate more in their communities. In Alaska, the money given under the programme generally proved beneficial to recipients, but there was a tendency for a small reduction in the number of hours worked and the amount they earned. In contrast, in the analysis of Altman's project in the United States, the researchers found no evidence of a significant reduction in the overall labour supply. The decrease in some categories of workers (the elderly, the sick, the disabled, women with small children, young people still in school) did not reduce the overall supply and was offset by an in-

dochodu-p,nId,6033059#crp_state=1 [access: 2.12.2024]; K. Kępa-Brożyna, *Bezwarunkowy dochód podstawowy. Kto otrzyma 1300 zł od państwa?*, <https://wiadomosci.wp.pl/bezwarunkowy-dochod-podstawowy-kto-otrzyma-1300-zl-od-panstwa-6811864754543232a> [access: 2.12.2024].

⁵¹ Z. Biskupski, *Pora na nowy zasiłek z ZUS dla każdego, 1700 zł co miesiąc to już za mało, trzeba zwaloryzować o inflację czyli podwyższyć?*, <https://www.infor.pl/twoje-pieniadze/swiadczenia/6738595.przyszla-pora-na-nowy-zasilek-z-zus-dla-kazdego-1700-zl-co-miesiac-to.html> [access: 10.12.2024].

creased supply from other members of the community. In the experiment in Finland, the money was given only to unemployed people. The main aim of the programme was to investigate how the social security system could be modified in the direction of greater active participation by giving recipients stronger inducement to work. Although recipients of the basic income had better incentives to work, in this respect the programme did not generate either more hours worked or higher incomes. However, the observed effect was better well-being of those who received the money. On the other hand, people taking part in the pilot knew about its periodicity, so their behaviour would probably be different than in the case of a permanent income. In Germany, one project (implemented on the basis of a lottery) proved that additional income contributed to the fact that the beneficiaries felt more secure, could continue their education, and more than one third felt more motivated at work. Another German experiment using a solidarity basic income ended unsuccessfully in terms of achieving the goal of creating 1,000 subsidised jobs. The idea was to provide employment for people who had been unemployed for many years and to get them out of their long-term dependence on social benefits.

In Kenya, the evaluation showed that the UBI recipients' lives improved significantly. Hunger was reduced and nutrition improved, investment, income from agriculture and small businesses increased, and citizens were more satisfied in many respects. However, the number of hours worked did not change substantially, while beneficiaries switched to self-employment (a reduction in the number of hours of hired work, with some increase in non-farm self-employment). It was similar in India, where additional income had a positive impact on economic activity, debt repayment, improved sanitation, healthier diet, reduced alcohol consumption, higher school attendance, and increased spending on children's education. An increase in the level of professional activity was observed in the experimental group – the total number of hours worked rose (as a sum of hired work, self-employment, and household work).

According to Arkadiusz Sieroń, the above-mentioned positive effects of UBI do not necessarily prove the benefits of this solution, but they confirm the positive effects of the increase in the income of the poorest people. Namely, poor people had more money at their disposal, so, among other things, they ate better. When the experiment was carried out in one of the poorest regions (India), there were stronger positive effects of income growth than would be observed in a more developed region with higher income. Therefore, the conclusions from the experiments related to the positive outcomes of the increase in the income of

the poor are not surprising but the results regarding employment are not scalable, i.e. some of the negative effects on labour supply materialise only in the longer term, extending significantly beyond the research horizon⁵². It is difficult to generalise the study from India to developed countries. Grzegorz Gołębiowski rightly notes that “despite conducting study programmes, it should be borne in mind that the observed effects will depend on the culture of a given community and, among other things, for this reason, it will be possible to observe different attitudes to many of the results of this programme. The impact, for example, on the willingness to take up employment will depend on the general norms present in a given community”⁵³.

The analysis shows that it is difficult to carry out an experiment concerning UBI taking into account primarily the specific time, the designated area and the high costs. It is therefore not easy to draw correct conclusions, e.g. in the context of the planned UBI experiment in Poland. It is problematic to make inferences about the Polish economy on the basis of the study in which even the maximum assumed number of beneficiaries will take part (in the Warmińsko-Mazurskie Voivodeship) because the study will not fully take into consideration the negative effects of financing a potential national programme through high tax increases and/or a rise in the money supply. UBI paid for only two years will have different effects than if it were – according to the paradigm – of unlimited duration. People receiving UBI for a certain period will have much less motivation to quit their jobs than people who could reasonably assume that they will receive money for the rest of their lives. According to economic theory, an increase in non-wage income will have a negative impact on both the motivation to work and the employment rate. Not everyone will immediately and completely resign from a job, initially, this will concern people who are the least connected to the labour market (working occasionally or part-time). However, as time passes and as they observe other people’s behaviour, more and more of them will limit their supply of work. It is likely that if they have lost their job, they will also be less active in looking for another post⁵⁴.

Andrzej Sadowski considers UBI to be another form of benefit, and in his opinion “benefits destroy social structures – children see parents who instead of

⁵² A. Sieroń, *Czy możemy wprowadzić bezwarunkowy dochód podstawowy?*, <https://mises.pl/storage/files/articles/2022/06/sieron-czy-mozemy-wprowadzic-bezwarunkowy-dochod-podstawowy.pdf>, p. 7–8 [access: 2.12.2024].

⁵³ G. Gołębiowski, *op.cit.*, p. 38.

⁵⁴ A. Sieroń, *op.cit.*

working receive allowances because it is more convenient for them and then repeat these patterns in their adult lives. The state does not have its own money and each new benefit requires an increase in taxes and/or other fees. In order to receive 800 euros from the state, a Finnish citizen will first have to give this money back in various forms, and perhaps even more, because after all he also has to work for, for example, an unemployed neighbour⁵⁵. In turn, according to Ryszard Szarfenberg “this money is to allow citizens to meet their basic needs and not all the needs, while motivation – if the amount is set appropriately – should not weaken significantly. It may decrease, for example, among those who do the simplest and lowest-paid jobs. In such a case, employers will have two options – either they close the business or they increase wages”⁵⁶.

Supporters of the introduction of unconditional income believe that it will help reduce poverty, redress social inequalities and will be an element of professional activation. Promoters of UBI most often refer to the issue of public debt as a solution for financing such a tool of social policy. This is indeed possible, but it involves significant economic risk. For opponents of this solution, it is another unnecessary social handout, which will translate into even greater deactivation of the unemployed. In addition, it is a costly solution – its implementation would be a large fiscal burden, and as a result of rising inflation the purchasing power of such a potential benefit would decrease at a relatively rapid pace.

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⁵⁵ J. Ceglarz, *Bezwarunkowy dochód podstawowy. Czy Polska powinna pójść w ślady Finlandii?*, <https://www.money.pl/gospodarka/wiadomosci/arttykul/bezwarunkowy-dochod-podstawowy-finlandia,239,0,2043631.html> [access: 27.01.2024].

⁵⁶ Ibidem.

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