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Access details: Access Details: [subscription number 929821320]

Publisher Routledge

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Critical Review of International Social and Political Philosophy

Publication details, including instructions for authors and subscription information:

<http://www.informaworld.com/smpp/title~content=t713634601>

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Simon Birnbbaum^a

^a Stockholm Resilience Centre & Department of Political Science, Stockholm University, Sweden

Online publication date: 19 November 2010

To cite this Article Birnbbaum, Simon(2010) 'Radical liberalism, Rawls and the welfare state: justifying the politics of basic income', Critical Review of International Social and Political Philosophy, 13: 4, 495 – 516

To link to this Article: DOI: 10.1080/09692290.2010.517968

URL: <http://dx.doi.org/10.1080/09692290.2010.517968>

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Radical liberalism, Rawls and the welfare state: justifying the politics of basic income

Simon Birnbaum*

Stockholm Resilience Centre & Department of Political Science, Stockholm University, Sweden

In response to recent policy trends towards linking social rights more tightly to work requirements, this article argues that those sharing Rawlsian commitments have good reasons to prefer a radical-liberal policy agenda with a universal basic income at its core. Compared to its main rivals in present policy debates, the politics of basic income has greater potential to promote the economic life prospects of the least advantaged in a way that provides a robust protection for the bases of social recognition and non-subservience. The argument seeks to establish that these concerns should be ascribed priority in the most plausible balancing of Rawlsian objectives and that doing so generates a strong case for basic income. As recent arguments for basic income have suggested that Rawls' theory is insufficient to make the case for such a reform, this analysis also demonstrates that a powerful argument for basic income can be built on Rawlsian foundations alone.

Keywords: Rawls; basic income; workfare; recognition; non-subservience

1. Rawlsian justice and the welfare state: two challenges

Preventing unemployment, substantial inequality of resources and unequal opportunities in the labour market are widely shared concerns in economically advanced welfare states. In recent years there has been an influential trend in both egalitarian and conservative thought emphasizing in a much more pronounced way the importance of linking income security to work requirements in tackling those challenges. In such ideals of welfare contractualism a minimum income is not an unconditional right of citizenship but something that one must earn (e.g. Giddens 1998, Layard 2005, Mead 2005, White 2003). In order to remain eligible for a guaranteed minimum income people must demonstrate that they are available for work, actively applying for work and prepared to undertake other activities.

*Email: simon.birnbaum@statsvet.su.se

This paper contributes to the exploration of an alternative, radical-liberal option by presenting a Rawlsian case for an unconditional basic income. It is uncontroversial to say that Rawls' justice as fairness is the most influential theory of social justice. With its concern for countering inequalities that seem arbitrary from a moral point of view, and to do so in ways that respect basic liberties and remain consistent with a wide range of conceptions of the good, Rawls' view offers a very forceful justification of many of the fundamental ideals and objectives that are broadly supported in existing welfare states.

I am, of course, not the first to seek a justification of basic income on liberal-egalitarian grounds. In recent years, however, many proponents of basic income have suggested that a solid non-perfectionist case for basic income must rely in crucial ways on non-Rawlsian views, such as left-libertarianism (Widerquist 2006), Dworkinian ideas about equality of external resources (Van Parijs 1995) or a republican account of freedom (Raventós 2007, Pettit 2007).

Against this background, the project of mounting a case for basic income on Rawlsian foundations responds to two challenges. The first is to argue that the politically influential ideal of welfare contractualism is actually, on balance, more difficult to reconcile with widely shared, Rawlsian starting points than a basic income alternative. The second challenge, more narrowly concerned with other justifications of basic income in the literature, is to demonstrate that the Rawlsian framework holds sufficient resources to make a powerful case for an unconditional basic income.

Radical liberalism – as I shall characterize it – holds a substantial universal and unconditional tier of distribution to be one of the ideal requirements of liberal-egalitarian justice.¹ Such an ideal is radical in the sense that it demands far-reaching equalization of opportunities. It is also distinctively liberal by insisting that people must be left free to use their resource shares for a much wider range of purposes and life plans than those typically accessible through traditional distributive schemes (involving a work test or other forms of behavioural conditionality).

While many of my arguments in this paper may, in some contexts, also support similar schemes (such as a negative income tax or a basic capital) I will mainly consider the option of introducing a regular basic income alongside many of the in-kind benefits and social services of existing welfare states. A basic income is an income paid to each citizen (or permanent resident) without any means test or work requirement. The long-term objective of a policy path in this direction is to reach a basic income sufficient at least to cover the basic necessities of life and, thus, replace or marginalize the role of most existing means-tested schemes. While other technical variations are possible I shall generally assume that it would take the form of a uniform tax-free payment on which income from other sources can be freely added (cf. Pateman 2005, Raventós 2007, Van Parijs 1995).

The paper is organized as follows. First, briefly introducing the Rawlsian framework I articulate and examine the most important reasons for and against

work-conditionality and basic income available from Rawls' difference principle (section 2). Having identified some difficulties of grounding basic income in the difference principle I then turn to develop a set of arguments for why a basic income strategy seems preferable to approaches that consistently tie the social minimum to work obligations. Sections 3–4 spell out my Rawlsian grounds for why (a) the promotion of opportunities for meaningful activities and the conditions for non-subservience of the least advantaged matter in crucial ways to a plausible account of maximin justice and (b) why a basic income regime would do better than its main alternatives within these dimensions. In sections 5–6 I respond to objections that accept the normative premises of my argument but insist that an obligation to work is required to meet the very same moral objectives. Finally, the paper is concluded with some clarifications and caveats (section 7).

2. The difficulty of grounding basic income in the difference principle

According to John Rawls, the right principles of justice for a fair scheme of cooperation are identified behind a veil of ignorance. Behind the Rawlsian veil we lack information about our specific ethical inclinations, talents, family attachments, etc., but we do have general knowledge of all relevant empirical facts needed to make a decision on what principles and institutional arrangements to accept. We know that we must be prepared to live a complete life in a society guided by the principles of justice chosen, but we do not know if we will turn out to be rich or poor in marketable talents, whether we will be religious or atheists, leisure loving surfers or hard-working Protestants, etc.

The contractual device of the 'original position' is employed to bring out the meaning and implications of an impartial and equal concern for the interests of all, regardless of their circumstances or conceptions of the good life. Given the high stakes involved in this very special choice and given the assumption that the decision is final (we must be prepared to live a full life under the chosen set of principles, whatever the outcome) Rawls famously argued that the most rational rule for decision-making behind the veil of ignorance is maximin, i.e. 'to adopt the alternative the worst outcome of which is superior to the worst outcomes of the others' (Rawls 1971, pp. 152–153). In other words: we should select the institutional arrangement that provides an outcome that is as beneficial as possible for the least advantaged. Rawls proposes the following two principles of justice:

- (1) Each person has the same and inalienable claim to a fully adequate scheme of equal basic rights and liberties, which scheme is compatible with the same scheme of liberties for all.
- (2) Social and economic inequalities are to satisfy two conditions: (a) They are to be attached to positions and offices open to all under conditions of fair equality of opportunity; and (b), they are to be to the

greatest benefit of the least advantaged members of society (Rawls 1996, pp. 5–6, 2001, pp. 42–43).²

In this paper I shall be primarily concerned with the second part of the second principle, usually called the difference principle, and leave aside details and priority problems with which this set of principles presents us (I introduce some aspects of 1 in section 3). In assessing competing arrangements from the point of view of the difference principle, the worst off are, roughly, identified by looking at the least advantaged person's share of so-called primary social goods. If, behind the veil of ignorance, we are left with no knowledge of our own ethical convictions, Rawls' idea is that our account of advantages or resources should be more or less untied from any particular ideals of the good life. Hence, social primary goods are things that a rational person is normally presumed to want 'whatever else he wants' or, as he later specified, that people need in their status as 'free and equal citizens' and 'fully cooperating members of society' (Rawls 1971, pp. 62, 92, Rawls 2001, p. 58). For Rawls, this includes, among other things, income, wealth, powers and prerogatives, and the social bases of self-respect.

What are the implications of Rawls' view for the issue of work requirements and the social minimum? Let us start by reviewing some possibilities in dialogue with the earlier literature on this issue. In *A Theory of Justice*, Rawls actually mentions the negative income tax (which automatically provides a non-work tested guaranteed income for anyone below a certain income threshold) as part of the institutional structure that justice as fairness may recommend. He also links the difference principle to the objectives of providing all with an adequate social minimum (Rawls 1971, pp. 275, 277, 285).

It is not difficult to identify arguments in support of such an orientation towards unconditional transfers. After all, under any scheme of income support based on stringent forms of means-testing and/or a work-test there will always be some individuals falling through the safety nets. By contrast, a fully universal basic income, paid directly to each member of society, should be more or less watertight by avoiding most causes of low or partial take-up of the relevant benefits (cf. Van Parijs 1995, pp. 94–96, 2003, pp. 216–222).

A basic income scheme does not involve any intrusive procedure that may easily generate feelings of shame among the needy. There is no informational or administrative complexity that may give rise to difficulties to decide whether or not someone is actually eligible for support. Nobody would be prevented from knowing their rights or fail to activate support because of stigmatization, lack of relevant information or skills. Hence, by opting for this radically universalistic strategy we would have done what we can to make sure that nobody in the relevant community falls below the level of the guaranteed income.

For reasons to be explained this is not, however, the interpretation that Rawls himself favoured once faced with various objections to the difference

principle. In 1974 Richard Musgrave stated the critique that Rawls' initial formulation of that principle involved an objectionable bias in favour of those with a strong preference for leisure or non-market activities. He argued that it would unfairly support healthy adults who *choose* to indulge in a life of leisure at the expense of their hard-working fellow citizens (Musgrave 1974). Using Rawls' way of identifying the least well-off, we would find not only low-paid workers or involuntarily unemployed in that category but also leisure-oriented persons who can work but simply *prefer* not to. This objection about the difference principle's alleged insensitivity to people's responsibility for work-leisure choices has later been repeated by many other critics, including in Will Kymlicka's influential discussion (Kymlicka 2002, pp. 73–74).

Can it be right (to take an example later discussed by Rawls) that a person who prefers surfing along the beaches of Malibu all day to the unglamorous reality of full-time work should be entitled to access public funds in the form of generous income rights on an unconditional basis? No decisive suggestion on the normative status of basic income seems to flow from Rawls' own interpretation of his principles of justice. One reason is that Rawls' egalitarianism is distinctively pluralistic. The substance to be equalized or maximised is not *one* clearly identifiable and measurable currency, but a flexible index of primary goods. Rawls offers little guidance on how to ideally weigh the various types of goods against one another and seems to suggest that the implications of justice as fairness for our present concerns must be worked out in pluralistic fashion at the legislative stage where information about the particular situation, context and traditions is available.

It must be observed, however, that Rawls also offered arguments to tighten the link between the principles of justice as fairness and the case for attaching work requirements to the social minimum. In response to the kind of criticism voiced by Musgrave and Kymlicka, Rawls repeatedly held that a promising way to deal with the Malibu surfers would be to include leisure in the index of primary goods: 'twenty-four hours less a standard working day might be included in the index as leisure. Those who were unwilling to work... would have extra leisure stipulated as equal to the index of the least advantaged. So those who surf all day off Malibu must find a way to support themselves and would not be entitled to public funds' (Rawls 1996, pp. 181–182, note 9, 2001, p. 179).

Accepting Rawls' idea of adding leisure to the list of primary goods and to weigh income, work and leisure in the way suggested, would thus enable us to say that once we operate with a more complete notion of relevant goods, poor people who are *voluntarily* unemployed do not actually belong to the least well-off. Even though they do not benefit from income or wealth, they benefit extensively from leisure beyond that offered to those working full time. This suggests that in comparing the income prospects of the least advantaged under different arrangements we should mainly be concerned with the

least well-paid full-time *workers*; i.e. typically ‘unskilled labourers’ (Rawls 1971, p. 78).

Before examining this option further I want to identify another and perhaps more forceful response available for Rawlsians who want to avoid the Musgrave-Kymlicka type of charge. Rawls offered many different ways of specifying the difference principle (for an excellent overview, see Van Parijs 2003). But the formulation of the principle he tends to accept in most passages is actually concerned with average *life prospects* of the worst off. Rawls wants to maximize the expected lifetime share of primary goods of a representative member of the group holding the least favourable social position (Rawls 1971, pp. 64, 98, 285, 1982/1999, pp. 362–363, Schaller 1998, p. 371).

If accepted, this interpretation would clearly strengthen the view that our Rawlsian arguments for a generous, watertight basic income scheme rest on objectionable moral priorities. Moreover, the difference principle would actually be much less vulnerable to the Musgrave-Kymlicka objection than such critics (and Rawls himself) tended to believe because the implications they are concerned to avoid would not follow. If the difference principle is indeed applied to lifetime expectations, this would be compatible in principle with distributive arrangements under which people’s actual monthly incomes would sometimes be very low and even fall temporarily below a certain poverty threshold *if* we could safely assume that the incentives of such a scheme would help maximize the long-term prospects of the relevant group. Also, attaching some productivity-enhancing behavioural conditionality to the social minimum would arguably be required if (again) the expected (say) total earned incomes of the least favourable worker were to expand as a result in the long run.

Hence, a ‘life prospect’ perspective with such an emphasis on income and wealth expectations harbours powerful reasons for rejecting any basic income policy that would significantly reduce work incentives. By opting for a basic income policy that allows people to choose more freely what kind of work to accept, and how much to work, a lower volume of labour output could be expected compared to policies more closely tied to stimulate employment, human capital investment or other productive activities. If the lifetime expectations of income and wealth for the least advantaged are thereby made lower the basic income option would seem far from optimal from our Rawlsian standards.

3. A broader agenda: the significance of leisure-time and self-respect

The previous section may have left us with some uncertainty about the relevance of a solid, regular guaranteed minimum of some kind (work-tested or not) and thus of our initial remarks about conditionality and low take-up. However, we should first observe that these concerns are firmly reinstated

once we seek to make sure that people can effectively make use of the basic rights and liberties covered by Rawls' *first* principle, having lexical priority to equality of opportunity and the difference principle. Rawls plausibly holds that effective freedom, in this sense, requires some form of minimum income, ensuring that everyone's basic needs are met (Rawls 1996, p. 7, Casal 2007, pp. 323–324, Schaller 1998, p. 376). Whatever might be the optimal policy from the point of view of maximising life prospects, then, the argument from effective freedom provides independent grounds for why any such balancing must operate on the foundation of some kind of sufficiency floor.

I shall now turn to two key considerations that may help decide whether such a minimum should take a work-tested or unconditional form if it is also going to maximise life prospects within the relevant dimensions. First, if we are serious about introducing leisure as primary good – as suggested by Rawls in response to the Musgrave-Kymlicka type of argument – adherents of the basic income approach have good reasons to question why the outcome of a life prospects comparison is something that should be held against their view. It is true that Rawls' argument on leisure as a primary good helpfully provides us with a reason for why we must not regard a full-time worker and a full-time surfer (having the same income level) as equally situated from the point of view of justice.

However, as pointed out by Philippe Van Parijs, this would also offer an argument *in favour* of basic income-oriented policies when assessing life prospects. True, the economic incentives and cultural dynamics of a feasible basic income regime might not be optimal for maximizing the expected lifetime shares of income and wealth for the least advantaged. But access to a subsistence level basic income *is* (all other things being equal) likely to offer better opportunities for all to bargain for working conditions that provide more part-time work, career breaks and leisure compared to institutions that consistently tie income rights to work obligations (Van Parijs 2003, pp. 219–220).

Secondly, Rawls' own (rather abstract and general) account of the difference principle does not offer much guidance on how to address situations of unemployment and job inequalities or, more generally, to deal with side-effects of our best instruments for promoting participation in paid work. Once we introduce the challenge of preventing unemployment *and* take into account another primary good mentioned by Rawls, namely the social bases of self-respect, our conclusions are likely to diverge substantially from those stated in section 2.

It is well-known that Rawls stressed that self-respect is, in many ways, the most important primary good, because if we lack self-respect 'nothing may seem worth doing, or if some things have value for us, we lack the will to strive for them'. Rawls' account of self-respect includes first 'a person's sense of his own value, his secure conviction that his conception of his good,

his plan of life, is worth carrying out. And second, it implies a confidence in one's ability, so far as it is within one's power, to fulfil one's intentions'.³ Hence, the parties of the original position 'would wish to avoid *at almost any cost* the social conditions that undermine self-respect' (Rawls 1971, p. 440, emphasis added).

Perhaps a basic income regime would provide less income and wealth but more leisure to the least advantaged compared to an egalitarian 'obligation to work' regime facing similar conditions. Before introducing self-respect we may have no solid Rawlsian grounds for saying that one type of regime looks superior to the other. However, *if* we go along with the fundamental moral status that Rawls ascribes to self-respect – and I see no reason why we should not – this suggests the differences between regimes in expected access to income, wealth or leisure over the course of a life to be less important than differences in access to the social bases of self-respect.

How could considerations on self-respect unbreak our tie between basic income and work-tested schemes? I shall argue that the prospects for social recognition and non-subservience are key elements in the Rawlsian account of the social bases of self-respect. Providing people with access to (and not preventing them from taking part in) meaningful forms of participation, with opportunities for social recognition is, no doubt, very important if we want to promote social conditions for the development of a person's *confidence in her abilities* and *lively sense of her own worth*.⁴

In section 2, I mentioned how problems of stigmatization may prevent distributive programmes from reaching intended, low-income recipients. But surely, the problem that transfers based on certain forms of classification may be interpreted as visible markers of inferior status (and thus bound up with feelings of failure, guilt or shame) is something that looks morally troubling quite apart from its potentially negative effects on the take-up of income support. As argued by Catriona McKinnon, the social bases of (Rawlsian) self-respect demands that people can pursue their projects with a 'non-subservient self-conception' (McKinnon 2003, p. 146).⁵ Prima facie, distributive arrangements under which some people must live (to use a republican phrase) at the mercy of others seem objectionable from this point of view.

With this general reconstruction in place – to be specified more fully below – it is easy to understand Rawls' repeated emphasis on meaningful work and personal independence in his characterization of the ideal of a well-ordered society:

no one need be servilely dependent on others and made to choose between monotonous and routine occupations which are deadening to human thought and sensibility. Each can be offered a variety of tasks so that the different elements of his nature find a suitable expression...The division of labour is overcome not by each becoming complete in himself, but by willing and meaningful work within a just social union of social unions in which all can freely participate as they so incline (Rawls 1971, p. 529).

4. A Rawlsian case for basic income

In this section I will argue that a basic income approach has crucial advantages relative to its conditional rivals when trying to meet the Rawlsian agenda set out in section 3. My central argument is that a basic income scheme has the capacity to help boost the economic prospects of the least advantaged in ways that *also* (1) promote their access to opportunities for social recognition and (2) secure important conditions for each person's non-subservience at each stage of their lives. In contrast to distributive schemes that rely on stringent forms of means-testing and/or work conditionality a firm layer of unconditional and universal payments offers a path to realize our Rawlsian objectives without causing fundamental trade-offs between them.

The potential of a basic income scheme to help support access to meaningful employment for the least advantaged stems primarily from the fact that its unconditional nature makes it possible for those receiving it to reject or leave unsatisfactory jobs. People can thus place much more emphasis on the content of the activities offered. Social assistance and social insurance schemes typically allow payments only on condition that recipients are prepared to take a job if offered, whether or not they find it rewarding. The fact that people are given this kind of bargaining power by the basic income payment would thus reduce the availability of people competing for highly unattractive jobs at low wages. It would thereby strengthen economic incentives for employers to develop job-saving technology or to improve working conditions for such tasks.

Those who are sympathetic to workfare policies may now reasonably object that this bargaining power would not, on balance, support the recognitional bases of Rawlsian self-respect if it would greatly reduce work incentives for the less advantaged. If people are not only free to reject unsatisfactory jobs but also economically discouraged to take *any* job this economic equalization may lock healthy people into unemployment, isolation and idleness. The general thought is that the reservation wages under such a scheme would be very high because of the high effective marginal tax that people in the lowest income brackets would face under such a scheme.

Such an argument, suggesting a trade-off between redistribution and social recognition may have considerable force when targeted against the forms of welfare dependency experienced under a means-tested social assistance scheme with lax or no work requirements. But it is crucial to see that a sensibly designed basic income scheme is something very different. Since a basic income without a so-called poverty trap is not (like social assistance payments) reduced as income from work or capital is added to it people are free to *combine* paid work, savings and basic income in a flexible way. It could thereby introduce extensive opportunities to subsidize self-employment, to accept a part-time job or to take jobs that are low-paid (and perhaps not viable in the absence of basic income) but intrinsically rewarding.

It could also make 'job sharing' between the involuntarily unemployed (who want to work more) and the involuntarily *employed* (who want to work less) more feasible. Having the basic income to rely on would provide greater freedom to take a career break in order to improve one's skills, or to engage in a wide range of non-remunerated activities beyond the wage-based economy that one finds attractive. Through these mechanisms a basic income policy (perhaps linked to the removal of some labour market regulations that may become redundant with a basic income in place) can help equalize resources while at the same time promoting access to meaningful activities for the least advantaged.

A possible trade-off between economic equalization and social recognition is also present in various inactivity traps facing those who have become categorized in conditional distributive schemes as (more or less) permanently *unable to work*. Individuals who find themselves in these situations – early retirement, sickness, limited employability – are often unavoidably encouraged by the rules of inactivity-conditional schemes to regard themselves as unable to work or contribute in order to remain qualified to receive the necessities of life.

To the extent that people would risk losing their access to a steady, reliable stream of income if they try to take a job or accept other work-like activities in civil society or the domestic sphere (thus indicating that they may actually be able to work after all), such programmes clearly introduce incentives to become or stay unable to work, and thus inactive, in order not to jeopardize their income security. Through these inactivity traps, dependency on such schemes may often be harmful to the opportunities for social recognition and, thus, the confidence and self-esteem of the least advantaged, especially when the categorization involved is found stigmatizing and constraining.

Having a universal basic income to rely on, and having the freedom to combine the basic income with paid work, should not only make meaningful (part-time) employment more accessible for those having difficulties to cope with a full-time job. It would also become economically smoother and less risky to move out of remaining conditional programmes based on inability to work. By avoiding stigmatization and by not basing eligibility to receive an income on the kinds of classification and inactivity mentioned, the basic income scheme offers economic security without fostering a personal identity as (more or less permanently) incapable of work or other contributive activities.

Having established some key advantages of the basic income option for equalizing economic resources while at the same time supporting the recognitional bases of self-respect, let us now turn to the issue of redistribution and the conditions for *non-subservience*. Consider the obligation to work and conditional income rights from the point of view of individuals who are frequently in need of income support or help from partners, employers, friends or relatives. Even when individuals in such conditions do manage to

get the *income* they need to cover their basic needs, they still live, in a sense, at the mercy of others and, thus, remain in circumstances of exploitable dependency (White 2005).

The non-subservience condition of self-respect is not very clearly articulated in Rawls' own writings. It is, however, as indicated by his remarks on independence and meaningful work quoted above, implied in several parts of his thinking. This interpretation can, for instance, help justify and explain Rawls' view that an egalitarian form of property-owning democracy would be superior to welfare state capitalism. Rawls emphasized the need for widespread ownership of wealth and human capital *ex ante* and thereby minimizing the need for the means-tested benefits *ex post* that he associated with welfare state capitalism.

A property-owning democracy, endowing people equally from the start, would move beyond the reactive focus of many welfare state arrangements and minimize chronic dependency on welfare by putting 'all citizens in a position to manage their own affairs on a footing of a suitable degree of social and economic equality'. Under Rawls' alternative, then, we must secure that the least advantaged are endowed as free and equal citizens, not objects of 'charity and compassion, much less our pity' (Rawls 2001, p. 139, cf. Krouse and Macpherson 1988). James Meade's writings, on which Rawls' brief characterization of property-owning democracy relied, were even more explicit about the crucial link between material independence, bargaining power and non-subservience:

The essential feature of this society [the property-owning democracy] would be that work had become rather more a matter of personal choice. The unpleasant work that had to be done would have to be very highly paid to attract to it those whose tastes led them to wish to supplement considerably their incomes from property. At the other extreme those who wished to devote themselves to quite uncommercial activities would be able to do so with a reduced standard of living, but without starving in a garret (Meade 1964, pp. 40–41).

And, as he observes in another passage:

A man with much property has great bargaining strength and a sense of security, independence, and freedom...He can snap his fingers at those on whom he must rely for income, for he can always rely for a time on his capital. The propertyless man must continuously and without interruption acquire his income by working for an employer or by qualifying to receive it from a public authority. An unequal distribution of property means an unequal distribution of power and status even if it is prevented from causing too unequal distribution of income (Meade 1964, p. 39).

Following this Meade-Rawls agenda, let me point out two more specific reasons based on non-subservience why a basic income should be a part of such a radical-liberal path beyond the welfare state. First, as argued by Jonathan

Wolff there is a range of ‘harmful effects on respect-standing and self-respect caused by shameful revelation’ under work-based conditionality. One of them is that people are subjected to situations of demeaning exposure where one must not only admit to oneself but *also* make a convincing case to public authorities that one has not been able to find any job ‘despite one’s best efforts’ while others could easily do so (Wolff 1998, pp. 114, 121–122).

Secondly, the impossibility to withdraw from a relationship on which one depends for one’s livelihood – to live in exploitable dependency – is likely to silence the propensity to articulate to oneself and voice ideals and complaints to others, whether in the home, the workplace or the forum (cf. Okin 1989, p. 136).⁶ On Rawls’ view ‘we expect and indeed want people to care about their liberties and opportunities so that they can achieve their good. We think they would show a lack of self-respect and weakness of character in not doing so’ (Rawls 2001, p. 85). However, it is not surprising if people display this ‘lack of self-respect’ when they systematically depend on another for the satisfaction of their basic material needs and, for such reasons, need to suppress their individual concerns and wishes.

Having a firm, reliable and relation-independent basic income to rely on (or a capital endowment providing an equivalent level of independent economic security) gives a person (in the words of Karl Widerquist) the ‘the power to say no’ – to partners, bosses and welfare bureaucrats, or anybody else she may depend on for a living (Widerquist 2006). I conclude that this basis of immunity against the more urgent forms of demeaning exposure and exploitable dependency seems of great importance if we attach priority to people’s opportunity to express and act upon their wishes with strength and confidence, as non-subservient equals. Hence, if we follow Rawls in his concern for equalizing life prospects in ways that attach special weight to the social bases of self-respect there is a strong case for a robust protection of each person’s basic economic independence.⁷

5. Are work requirements needed to support the bases of self-respect?

I shall now move on to consider a counterargument against this radical-liberal interpretation of Rawls. In the Rawlsian context, the arguments on basic income in section 4 are open to the objection that self-respect would actually require the right *and* obligation to do paid work, and to enforce the latter through work requirements (Farrelly 1999, p. 291). According to a position defended by Donald Moon, and explored by Raymond Plant, self-respect is ‘something that people have to achieve according to the norms of respect in a particular society’ (Moon 1988, Plant 1993, p. 42). To Moon, only independence and self-sufficiency through paid work could truly offer the bases of self-respect in most existing economies (largely organized through wage-contracts).

There are two main routes for specifying this objection from self-respect. The *ethical objection* against basic income is based on arguments about

recognition and essential conditions for a good life. The *exploitation objection*, which captures an important element of the responsibility-based intuition expressed in the Musgrave-Kymlicka objection above, is based on the idea that self-respect is damaged by basic income because such a policy does not require us to fulfil our reciprocity-based duty to make a productive contribution in return for economic benefits (Schweickart 2002, pp. 76, 101). This latter type of objection is important and powerful but complex and must be dealt with separately (I have done so at some length in Birnbaum 2008, chapters 3–5, see also McKinnon 2003, pp. 152–156).⁸

In the remainder of this article I can only examine the ethical version of the objection. To spell out this objection from self-respect, it can be forcefully argued (and Rawls is one of those who have done so) that access to a paid job is normally a social and psychological condition for people to develop a lively sense of their own moral worth and a deep confidence in their abilities to pursue their objectives. One could add that it may also, especially at an early formative stage of one's adult life, play a very important role to facilitate the development and exercise of morally crucial (in Rawls' words) 'social capacities of the self' such as the communicative skills, the sense of responsibility and the moral sensibility needed to lead a satisfying and just life in fair cooperation with others (Phelps 1997, pp. 12–15, Rawls 1971, p. 442, 1982/1999, p. 366, Rawls 1996, p. lix, cf. White 2003, p. 60).

These arguments help express an important and widely shared view in political debates on work and welfare, namely that people need *work* to find recognition and develop basic abilities, not only passive income support. Moon has asked the following rhetorical question: 'If people hold the norm that they should be independent (in the sense of self-supporting), then how can the state provide them with the means of subsistence without violating their self-respect?' (Moon 1988, p. 35).⁹

Also, many of those who criticize unconditional income support from the point of view of self-respect worry about the lack of self-confidence of people who are unemployed in existing welfare regimes and argue that they are unlikely to make the choices necessary to move out of such a state in the absence of external guidance and activation (Mead 1987, 2005). For instance, Richard Layard argues that unconditional welfare transfers tend to make people end up in a state of 'grey resignation'. Hence, we need a politics of welfare-to-work under which 'you can only get benefits if you look really hard for work' and where you 'have to take advantage of what you are offered' (Layard 2005, pp. 67, 173–174). For their own good – for the protection of their self-respect – people must be required to remain activated: it is better to have some job than not having a job at all.

Do these arguments shake our conclusions in the previous section? First, we should observe that the 'Hegelian' outlook advanced by Moon, deriving justice from actual moral norms and expectations, is bound to generate a justification of something very close to the status quo. If failure or unwillingness

to be self-reliant through paid work is generally associated with a certain social stigma and if people in need tend to internalize such work expectations, it is clear that having a job will be extremely important to access the relevant primary goods. To be sure, those who do not work will not access the sources of self-respect to the same extent as those who have proper jobs if people in general view those who claim resources but who do not work as free-riders or even parasites. As Jon Elster points out, the feeling that one is a free rider or a parasite is likely to be devastating to self-respect (Elster 1988, p. 67, see also Anderson 2004).

However, the fundamental normative issue to consider must be whether the political community and reasonable citizens *should* express such universal expectations to be independent and self-reliant through paid work in the first place. In seeking to work out an institutional ideal we need to explore what principles and moral expectations people should be committed to rather than taking their operative moral convictions as given. If we are concerned about the prospects for the least well-off, attaching particular importance to the bases of self-respect, and if *one* very important cause of people's lack of self-respect is the attitudes and expectations others express with respect to their labour market status, the following obvious question arises: Is it not radically counterproductive to accept an ideal where income security and opportunities for useful participation are so strongly tied to paid employment, where the social conditions of people's sense of their worth is essentially based on their role in the economy, and where people who are not self-supporting through earned income are stigmatized as free-riders and parasites?

Still, the argument for why activation policies are required responds to an important social concern that would not simply disappear if our political community would take a milder stance to people who do not have jobs and offer them better living conditions. For many (perhaps most) people, paid work imposes a welcome structure on the flow of time, a daily routine, a sense of belonging, possibilities to find meaningful activities outside the family, friends, challenges and, thus, social recognition (Arneson 1990, Elster 1988, p. 62, Phelps 1997). The claim that access to meaningful paid work or some other form of social contribution whose value is personally rewarding and widely recognized within at least some (as Rawls calls it) 'community of shared interests' is a crucial component of the social bases of self-respect can be given plausible backing from general ethical and psychological arguments (Rawls 1971, p. 442, 1982/1999, p. 366).

There is quite an argumentative leap, however, from accepting this claim to also accepting Layard's case for a welfare-to-work approach. The importance of meaningful work was one of the fundamental reasons advanced *in defence* of an unconditional basic income (in section 4) as an instrument to improve the possibility to bargain for good working conditions while at the same time lowering the barriers to labour market participation. When considered from the point of view of social recognition and non-subservience,

employment-based strategies seem plagued with difficulties and negative side-effects of the kinds I have already discussed unless combined with, and restricted by, the independence-enhancing and opportunity equalizing instrument of (something like) a basic income.¹⁰

Such limitations can hardly be categorized as minor, contingent flaws that will be smoothly swept away once the 'right' political will obtains, and once the most well-designed employment programme has been put into place. It should also be observed that insofar as paid work *is* a crucial component of the recognitional bases of self-respect this is essentially because self-respect is a by-product of *doing something that others find valuable* rather than the activity of paid work (or workfare-activity) itself, i.e. regardless of whether or not the activities undertaken are in genuine demand and widely perceived as a valuable contribution (cf. Elster 1988, pp. 74–75).

6. Why the ethical argument for work obligations is ideological and illiberal

More fundamentally, if we attach priority to people's access to paths for social recognition (as a basis of self-respect), it remains unclear why the best option is to spend scarce social resources to create and administer work-like activities to all, and for pushing everyone into the structure of paid employment whatever his or her preference with respect to that activity. I will leave to one side qualms about whether using money to create activities for the unmotivated and making people apply for jobs they do not want are well spent from the point of view of economic efficiency. For the present argument, the important point is that self-respect-based ethical justifications of such arrangements conflate paid work and meaningful activity, thereby concealing how work obligations can stand in the way of, rather than supporting, people's access to useful tasks.

One advantage of a basic income strategy relative to an obligation to work regime is that it would build the bases of self-respect on wider social foundations. Consider the case of John. John lives under a basic income regime that enables him to lead a life he finds rich and fulfilling. He spends his typical day by working a few hours at a local café (supplementing his basic income), fishing with his friends, playing guitar in a band and coaching a children's football team. Now, his liberal-conservative government tells him that the structure of paid work is in fact a condition for self-respect and *therefore* it intends to remove the basic income. This means that John will be required to spend his days in a factory (accepting the only full-time job he can get) that he would do anything to escape. This will leave little time or energy left for the things he finds enjoyable and rewarding in life. However, the politicians in John's political community assure him that it is better for his self-respect to have a full-time job (or workfare activity) that is not very stimulating than not having one at all.

Now, there may be other reasons for why John should be required to work more in order to qualify for income support but our *ethical* argument for workfare or ‘welfare-to-work’ fails because it suggests that John should be thankful rather than insulted by this way of justifying such a political move. For those who share Rawls’ concern to move away from jobs that are (to repeat the quote used earlier) ‘deadening to human thought and sensibility’, the influential discourse according to which a job (or workfare-activity) is always better than an income (or that any job is better than no job) is counterproductive. It does not allow us to say that a condition where many people are enabled to lead lives like John’s – thanks to the basic income – is preferable to conditions under which these individuals have no option but to be employed full-time in exhausting and soul-destroying forms of labour, just to remain occupied. Many actual jobs do not offer social contacts, challenges or lack in other ways the properties commonly used to explain the essential role of paid work to recognition, confidence and the development of crucial social capacities. And many forms of activity (actual and conceivable) outside the labour market most certainly do.

There are of course work-based options attaching great priority to promote better working conditions for all than typical workfare policies. Under such options the relevance of the example offered might fade. For example, we could link the social minimum to an obligation to accept adequately paid, meaningful work (or activities to qualify for one) by putting massive resources into education, public sector employment, wage subsidies, and even supporting the development of worker-owned and worker-managed firms (Arneson 1990, White 2003).

Nevertheless, even if that would be the position from which we launch the ethical argument for linking work obligations to the minimum income – and abstracting from our various arguments against work conditionality in sections 3 and 4 – it would still be the case that (a) people’s preferences will differ with respect to the options available and (b) other forms of socially valuable activities beyond the wage-based economy offer conditions for personal development, of being useful to one’s community, access to social networks outside the family, developing skills and capabilities and so on, especially when the value of such activities and contributions are widely recognized (Gorz 1999, Pateman 2005). As Erik Olin Wright argues in defending the basic income alternative:

This would include things like childcare, eldercare and home healthcare services, recreational services, and a wide array of cultural and art activities. The production of these services in the social economy, it must be emphasized, is social, not private: the issue here is not moving childcare or eldercare services from market or state provision back to the family. Rather, the social economy is built around the public provision of such services by collective association rather than by the state or market (Wright 2005, pp. 200–201).

The point, here, is not to endorse Wright's particular account of the social economy. It is simply to illuminate the rejection of the view that paid work should be dealt with as a condition of self-respect in our Rawlsian ideal, and to stake out a general path towards a more inclusive, accessible and liberal basis for meaningful, self-respect conferring participation. The ethical self-respect-based argument against basic income in section 5 is stated in a language consistent with non-perfectionism (by appealing to the *primary good* of self-respect). However, this hides the way in which an obligation to do paid work, based on the objective to promote universal access to recognition and useful activities, runs counter to people's ethical interests on many reasonable conceptions of the good. Once unpacked and subject to closer scrutiny, then, this type of argument looks bound to clash with the liberal ideal of non-perfectionism.

The structure that paid work imposes on time is welcomed as a crucial condition of personal development and human flourishing by some, whereas others find that particular property of paid work detrimental to the realization of their conception of the good; a prison from which they cannot escape. Through the history of ideas particular forms (or the very institution) of waged work have been hailed as primary sources of self-fulfilment by some and deemed as tantamount to slavery by others. In making a decision behind a Rawlsian veil of ignorance on the choice of ideal political institutions, we are left unaware of what ethical value we may attach to the forms of paid work available to us and, thus, which of those categories we might find ourselves closest to. It is, to put the point mildly, hard to make a plausible *liberal* case for paternalistically pushing people into activities they strongly dislike, find humiliating or do not identify with in order to promote their access to the bases of self-respect. This is particularly clear when bringing our concerns of non-subservience to attention.

Surely, the ethical justification of the obligation to work, thus construed, has an objectionably moralistic flavour. Non-employment can be disastrous or liberating depending on the circumstances. In conclusion, the ethical argument from self-respect against basic income is objectionably illiberal and may, as illustrated through the case of John, easily turn ideological in the pejorative (Marxian) sense (see also Attas and de-Shalit 2004). Anyone who is embarrassed about claiming to be in possession of superior ethical knowledge (and ascribes false consciousness to those who disagree) will need to find some other way of supporting his or her anti-basic income intuitions.

7. Concluding remarks: beyond the obligation to work?

Rejecting the ethical objection from self-respect does not mean rejecting norms and arrangements to promote the thinner and more flexible Rawlsian objectives (that we have identified along the way) to offer each person 'a variety of tasks so that the different elements of his nature find a suitable expression' and the possibility to participate in an association of 'shared ends'. Even

so, this does not completely disarm the objection we have just considered. After all, there is nothing in the basic income proposal itself to guarantee that everyone will actually be able to find and undertake meaningful tasks – in the labour market or elsewhere – rather than ‘sink into apathy and cynicism’ (Rawls 1971, p. 440, Farrelly 1999, pp. 293–294).

In particular, there may be remaining worries about basic income related to the argument about responsibility- and solidarity fostering abilities at an early stage of a person’s adult life. One of the reasons advanced by Edmund Phelps for rejecting basic income is that ‘all too many young people would lack the vision and the will to resist yet another year of avoiding life’s challenges and risks’ (Phelps 1997, p. 111). It is far from obvious, from a non-perfectionist point of view, that we should be troubled by this freedom to ‘reject challenges and risks’ (why should we privilege a risk- and market-oriented way of life?). But it would also be too hasty to categorize this objection as flowing from an objectionably perfectionist bias in favour of work-oriented activities.

Linking Phelps’ concern to the Rawlsian assessment of life prospects one could build a case for why a short period of relatively constrained life situations in a formative stage of our adult lives should be accepted, all things considered (after all, few take compulsory schooling as objectionably illiberal). For example, certain ‘in kind’-benefits and conditional transfers in the form of educational opportunities, or other meaningful, participation-based schemes could be better than an unconditional basic income in cash for our long-term prospects, not only within the dimensions of income and wealth (as argued in section 2) but *also* in terms of self-respect and the cooperative capacities (mentioned in section 5) on which any feasible welfare regime relies.

In assessing the relevance and force of this case for introducing elements of conditionality, it is, of course, important to stress the opportunity-expanding potential of basic income with respect to a wide range of activities. However, the work-independent security of a basic income would make it possible to reject such opportunities and responsibilities and this may sometimes be a problem when we attend to our concerns of self-respect in a long-term perspective. Stimulating young people’s development of their capacities, and widening their horizon, clearly looks crucial if people are to be endowed with the opportunities to make well-informed choices and pursue meaningful paths for social recognition.

Let me close with three remarks on this. First, this objection would remain idle for a long time since an economically feasible basic income without a poverty trap would need to remain relatively modest for the foreseeable future. Hence, in addition to people’s own motive to find and accept opportunities that provide them with a socially rich and stimulating life (which should normally be very strong!) there would remain significant economic incentives in place to work in order to achieve a more comfortable standard of living.

Secondly, we must concede that unless educational institutions, wage-setting mechanisms, the norms of social participation and legal conditions for undertaking work-like civil society activities, are suitably modified and coordinated to stimulate and channel the possibilities of basic income in constructive directions, some of the stated Rawlsian advantages (from the point of view of recognition) of basic income would clearly weaken. If a basic income is largely justified through considerations on self-respect, and is to remain supportive to the set of capacities and virtues on which a just society depends, it should walk hand in hand with a social infrastructure of participation and an ethos of contribution (for helpful remarks on this theme, see Van der Veen 1998).

Thirdly, ethical objections from self-respect against basic income remind us of the importance of attending to the way that public expectations help shape the conditions for social recognition. The participation-enabling and opportunity-equalizing potential of the basic income will be a much less powerful mechanism for expanding the range of meaningful choices beyond the wage-based economy unless combined with a corresponding change in the attitudes expressed through public institutions to projects and forms of contribution outside the formal labour market. Taking these qualifications into account I conclude that our Rawlsian explorations leave us with a powerful case for basic income.

Acknowledgements

I thank the members of the political theory workshop at the Department of Political Science, Stockholm University, for comments on an early draft of this paper. I am also very grateful to the Hoover Chair of Economic and Social Ethics (Université Catholique de Louvain) and NCoE NordWel, in cooperation with The Rokkan Centre (University of Bergen), for postdoctoral fellowships enabling me to complete the final draft. Special thanks to Gustaf Arrhenius, Ludvig Beckman, Mikael Eriksson, Bo Lindensjö, Jouni Reinikainen, Magnus Reitberger, Nenad Stojanovic, Philippe Van Parijs, Martin Westergren, Stuart White and two referees of CRISPP for useful feedback and challenging questions.

Notes

1. I borrow the term radical liberalism from Ackerman (2003).
2. The first principle covers a wide range of familiar and (mostly) uncontroversial political and civil liberties such as freedom of thought, freedom of speech, liberty of conscience, the right to vote and participate in politics, freedom of assembly, freedom of association, rights protecting the liberty and integrity of the person and free choice of occupation.
3. Rawls argues that 'when we feel that our plans are of little value, we cannot pursue them with pleasure or take delight in their execution. Nor plagued by failure and self-doubt can we continue in our endeavours' (Rawls 1971, p. 440).
4. In specifying the meaning of the first part of the second principle, Rawls also emphasizes the freedom to choose occupation with access to a 'diverse set of opportunities' (Rawls 1982/1999, pp. 363, 366, 2001, p. 58). In the context of

justice as fairness, then, substantive (and not merely formal) freedom of occupational choice (access to ‘powers and prerogatives’) is an important objective in itself. In the Rawlsian view constructed here, however, I accommodate this concern by including it as one important element of a policy aimed to secure the recognitional bases of self-respect.

5. Given that Catriona McKinnon has also developed a self-respect based Rawlsian justification of basic income it is worth pointing out that the foundations of my argument are different in a least two important respects. McKinnon (2003) treats income and wealth as valuable only as a social basis of self-respect and, unlike my view, her argument does not seem to be based on the assessment of life prospects. My Rawlsian argument deals with income, wealth, leisure-time and self-respect as distinct and independently valuable primary goods. Competing arrangements are assessed by examining the prospects of the least advantaged over a life course under each scheme and the relevant primary goods are balanced in a way that gives special weight to the social bases of self-respect.
6. With the words of Gar Alperovitz: ‘liberty to speak out depends on a guarantee that one’s means of livelihood will not be undermined’ (Alperovitz 2001, p. 108).
7. In fairness to competing options it must be admitted that the feasible implementation of an unconditional basic income offering the means of subsistence without a poverty trap is likely to require higher average marginal tax rates than most existing packages of conditional schemes. However, anyone who attaches priority to the interests of the least well-off in a way that is sensitive to the set of concerns identified in sections 3–4 needs to give us a powerful argument for why we should not move in that direction, and why that cost is not worth paying.
8. Roughly, there are two main replies available against this version of the objection. One concedes that there may be some new forms of exploitation introduced by a basic income scheme but that this is a cost we must be prepared to pay when balanced against our other considerations on self-respect. A plausible way to spell out the bases of contributive duties, and the link to self-respect, would need to take into account the importance of a wide range of informal (non-remunerated) contributions. Once the basic income is anchored in this broader notion of contribution, and once it is tied to the set of incentives and opportunities sketched in section 7, we have grounds to doubt that this moral cost of exploitation would be (much) greater under a sensible basic income scheme than under work-tested programmes. A more fundamental reply draws on the argument that people can rightly claim some set of gift-like resources, such as (the return to) inherited assets or natural resources, *without thereby incurring reciprocity-based duties*. While I have myself defended a version of the second strategy, along the lines of Van Parijs (1995), I think the availability of the first reply is sufficient to save the Rawlsian argument stated in this article. Defending this claim further, however, would take us too far astray for present purposes.
9. A similar argument for why work-based policies are crucial to ‘destigmatize’ and support the self-respect of welfare recipients who (in her view rightly) tend to internalize the work ethic is developed by Elizabeth Anderson (2004). While supporting the link between self-respect and adherence to the work ethic Anderson does not, however, accept the argument that all recipients must be required (rather than presumed and encouraged) to work.
10. It is also questionable whether massive, individually targeted wage-subsidies, making explicit that certain subsidized jobs are earmarked for a distinct category of unskilled ‘low-productivity’ people who would not otherwise get a job, can play a role equivalent to other jobs from the point of view of self-respect (Van Parijs 2003, p. 220).

Notes on contributor

Simon Birnbaum (b. 1977) is Postdoctoral researcher at Stockholm Resilience Centre and Department of Political Science, Stockholm University. He obtained his doctoral degree in 2008. He has been a visiting graduate at the University of Oxford and post-doctoral fellow at the Hoover Chair of Economic and Social Ethics, Catholic University of Louvain. Until recently, he was a guest researcher at the Stein Rokkan Centre of Social Studies, University of Bergen with a fellowship from NCoE NordWel.

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