

UNIVERSAL BASIC INCOME: POTENTIAL AND LIMITATIONS FROM A GENDER PERSPECTIVE



SUMMARY

Over the past decades, a universal basic income (UBI) has repeatedly been put forward as a means to address increasing labour market precarity, jobless growth and rising poverty and inequality. Most recently, proponents have argued that UBI could provide much-needed protection in the face of economic, environmental and health crises, such as COVID-19. The implications of UBI for gender equality have received insufficient attention in these debates—despite the fact that feminists have long discussed its pros and cons. Some feminists hold that an unconditional income independent of paid work would enhance women’s agency in families, households, the workplace and the community, with particular benefit for those facing multiple and intersecting forms of discrimination. Others caution that, in a climate of fiscal tightening and austerity, UBI could be used to justify the rollback of state responsibility and funding for other essential support measures, including care services, housing, education and health care. Building on their contributions, this policy brief discusses the potential and limitations of UBI from a gender perspective and points to some of the specific design features that policymakers need to consider to make UBI work for women and transgender and gender-diverse people.¹

Universal basic income: Growing interest, but differing motivations

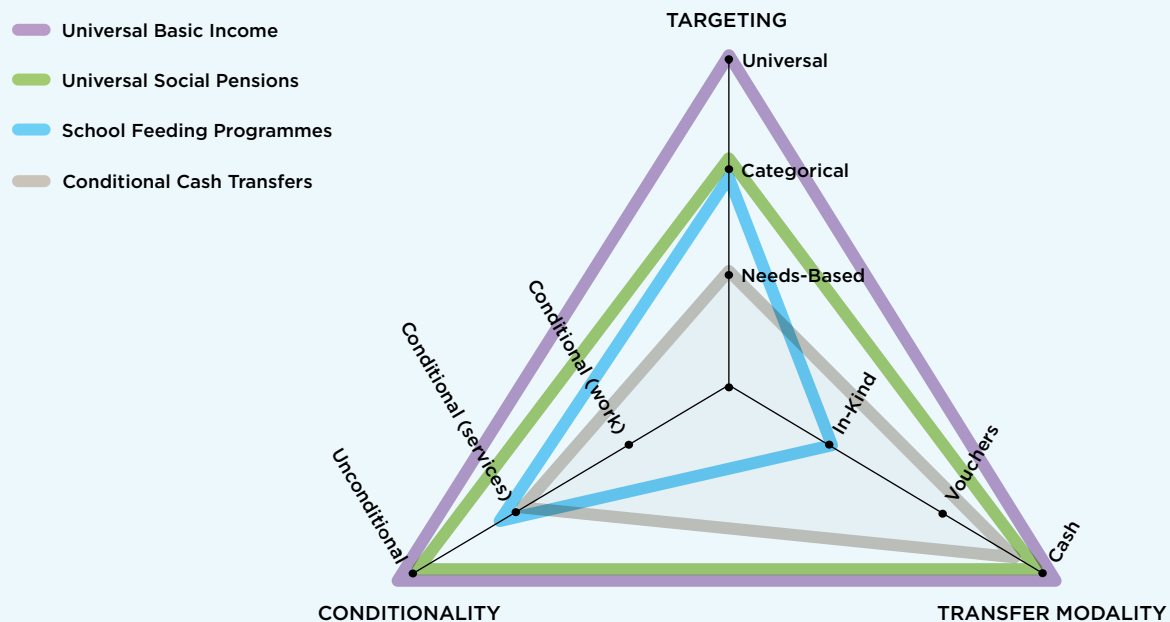
Even before the COVID-19 crisis, the idea of UBI was gaining traction—from the global to the local level. In his 2018 address to the General Assembly, United Nations Secretary-General António Guterres stated that, with increasing automation and the rise in joblessness and precarious employment, “governments may have to consider (...) universal basic income”,² and in 2018-2019, UBI proposals featured in campaigns for office by candidates in national elections including in India,³ Mexico⁴ and the United States.⁵ The current pandemic has provided further momentum, with UBI being cast not only as a suitable emergency protection measure but also as a means to address the stark inequalities revealed by the COVID-19 crisis.⁶

However, the motives for promoting UBI and the views on what it would entail in practice vary widely. Depending on where proponents stand on the political spectrum, UBI can be designed with different end goals in mind.⁷ UBI considered as a minimal safety net could be used to pave the way for further labour market deregulation and reduced spending on social security systems that provide comparatively higher levels of protection. In contrast, some progressive approaches view UBI as critical to achieving economic and social justice, redistribution and equity.⁸

For the purposes of this brief, UBI is defined as a cash transfer that is (a) individual, in that it goes directly to each person rather than to a household; (b) continuous, in that it is provided on an ongoing basis; (c) unconditional, in that it does not depend on labour market participation or the fulfilment of conditions; and (d) universal, in that it is paid to all.⁹

These features distinguish UBI from most existing social protection systems, although the relationship between UBI and social protection continues to be debated. UBI is non-contributory, meaning eligibility and benefit levels do not depend upon prior contributions. This makes it different to (contributory) social insurance systems, which tend to benefit those who are employed in the formal economy across their lifetime, and which feminists have long critiqued for being entrenched in male-breadwinner models and heteronormative bias, as well as for providing lesser protection to those who do not participate in full-time formal employment due to employment discrimination or caregiving responsibilities.¹⁰ UBI is also different to the majority of non-contributory social protection programmes, including cash transfers, which are often narrowly targeted to poor households and have been criticized by feminists for imposing cumbersome conditionalities on women recipients (such as ensuring children’s attendance at school or health clinics) and excluding families with lesbian, gay, bisexual, transgender, intersex or queer (LGBTIQ+) members.¹¹

FIGURE 1:
Comparing universal basic income with other social assistance schemes



UBI is distinct from a social protection floor, which refers to nationally defined access to essential health care and income security for all across the life course.¹² However, some argue that UBI could form an essential part of a social protection floor.¹³

What could universal basic income mean for gender equality?

Feminist perspectives vary on the significance of UBI for gender equality.

The feminist case for UBI

Feminist supporters argue that an individual income such as UBI could help guarantee women's economic autonomy in the face of ongoing discrimination in employment and increase their bargaining power in (and beyond) families and communities. UBI would remove the exclusionary pitfalls and stigma attached to means-tested schemes, as well as avoid the paternalistic and sometimes coercive implementation practices documented for some conditional cash transfers.¹⁴ It may also avoid the 'unemployment traps' sometimes experienced by welfare recipients who risk losing their benefits should they increase their labour force participation—with particular detriment to single parents and people with

disabilities.¹⁵ A secure and reliable income on an individual rather than household level could be especially important for those seeking to leave violent partners or unhappy relationships, by cushioning the financial shocks of partnership dissolution that tend to leave women and transgender and gender-diverse people worse-off than men.¹⁶ Research on cash transfers also suggests that a regular inflow of cash can in some cases mitigate intimate partner violence, including by improving emotional and mental wellbeing through reduced economic stress.¹⁷ In the context of employment, UBI may provide the necessary safety net to exit exploitative working conditions or buffer income instability for those unable to access waged work. Employment discrimination can make it especially difficult for transgender and gender-diverse people to access safe and secure employment. For example, in the European Union alone at least nine member States do not protect against discrimination in employment on grounds of gender identity.¹⁸

Some feminist proponents of UBI also celebrate its potential to reshape patriarchal gender norms around paid work and unpaid care, since no person is relegated to being a masculinized 'breadwinner' or feminized 'caretaker' in order to have income security. If combined with the provision of affordable quality care services, UBI could potentially encourage a more equitable distribution of care among

genders.¹⁹ Indeed, some argue that UBI could lead to higher valuation of a range of non-commodified activities, including voluntary, emotional/affective and creative pursuits.²⁰ Given that UBI is paid to individuals regardless of kinship relations, it could also support a range of diverse family forms, including cohabiting and extended families and ‘families of choice’ formed by many LGBTIQ people.²¹ Whether and to what extent these positive effects materialize will depend to a large degree on specific design features, including whether the UBI’s benefit level allows for maintaining an adequate standard of living.

BOX 1:

What can we learn from existing UBI schemes?

No national-level UBI scheme meeting the criteria defined above has been carried out, and the implications of a long-term scheme at that level are largely unknown.²² There is also a scarcity of gender-sensitive analyses of UBI pilots at any scale. However, a small-scale UBI pilot carried out in Madhya Pradesh, India, between 2011 and 2012 points to tentatively positive outcomes for gender equality.

In this trial, the Self-Employed Women’s Association (SEWA) partnered with the United Nations Children’s Fund (UNICEF) with hopes of providing a viable alternative to poorly-implemented, targeted welfare schemes.²³ A monthly transfer equivalent to 20-30 percent of the income of low-income families was given to 6,000 adults and children. Six months into the intervention, those receiving the transfer experienced a statistically significant increase in food sufficiency, with an especially large increase for Scheduled Caste and Scheduled Tribe households. School attendance increased for all children, with teenage girls seeing the greatest gains. The proportion of children with healthy weight increased from 39 per cent to 58 per cent during the trial period, and this effect was greatest for girls aged 2-5 years.

The receipt of the unconditional transfer was also associated with increased decision-making abilities for women, including greater influence on household spending. Although women’s labour force participation rate did not change, the kinds of work women did shifted to increase their incomes and agency, including a big increase in own-account activities rather than casual wage work.

Feminist notes of caution

Others have been more cautious about the implications of UBI for gender equality. The potentially high costs could preclude public investments in other areas, including care services. One estimation of the costs of UBI paid at 100 per cent of the national poverty line to every adult and child for a sample of 130 countries found that this basic level would require a significant fiscal outlay of 20 to 35 per cent of gross domestic product (GDP) for most world regions, making this a very difficult proposition for most countries and out of reach for those that are highly indebted.²⁴

The question of how the substantial level of resources necessary for UBI set at this level could be mobilized raises important questions about sustainability and equity, with implications for gender equality. For UBI to be within reach for highly-indebted countries, debt relief would be an essential first step. In the context of fiscal tightening and austerity, there are fears that UBI is being promoted to replace social security—which tends to provide higher levels of protection and promotes social solidarity—with a minimal social safety net plus individual private insurance schemes for those who can afford them. This runs the risk of exacerbating inequalities given that, in determining premiums and entitlements, private insurance schemes tend to discriminate by sex, age, pre-existing conditions that are affected by structural determinants of health, and other factors, rather than pooling risks and resources as is the case in solidarity-based social insurance schemes.²⁵ A flat-rate UBI for all would also fail to address specific gendered risks throughout life, such as childbirth, unemployment and old age, and may also erode existing provisions for groups such as women with disabilities or single mothers.

Feminists have also expressed doubt about how far UBI truly challenges ongoing gender- and race-based inequalities in unpaid care and paid employment.²⁶ They have cautioned that, rather than shifting gender norms on care, UBI in higher-income contexts and heterosexual partnerships may mean that women cut back on paid work while men continue in full-time employment and receive additional income on top. UBI would therefore be little more than a “housewives wage”, reinforcing gender inequalities.²⁷ The impacts of this potential reshuffling of household labour on migrant domestic workers remains unknown.²⁸

Given the enormous fiscal implications, most UBI schemes will likely not be generous enough to cover basic living costs, meaning that recipients will require additional sources of income, particularly from paid work. In this regard, UBI cannot make up for lack of fulfillment of worker’s rights or access to decent work, especially for women and transgender

and gender-diverse people experiencing multiple and intersecting inequalities in access to employment. Trade unionists have rightly warned that UBI does not solve issues of low pay, precarious work or lack of negotiating power in the workplace and could potentially detract from the need to tackle exploitative labour conditions and strengthen workers' rights, including through living wages, universal job guarantees, affirmative action, unionization and collective bargaining.²⁹ In this case, UBI would merely act as a band aid for a broken economic system and divert attention from more radical, transformative change needed to address structural inequalities.

Finally, UBI raises important questions around who is included in a purportedly 'universal' scheme. For example, if receipt were attached to narrow notions of citizenship, incarcerated or formerly-incarcerated persons (a group often including disproportionately high numbers of people of colour and people living in poverty), migrants and their children (particularly those who are undocumented), unhoused people and those without government-issued IDs that reflect their identity (including many transgender and intersex individuals) might all experience exclusionary treatment.³⁰ Box 2 further discusses the extent to which UBI could address structural inequalities.

The design features necessary for a feminist universal basic income

Debates remain largely hypothetical given that there are so few full-fledged UBI schemes, and because where they do exist they are usually not evaluated for gender impacts. It is clear that the extent to which UBI's potential for reducing gender and other inequalities will be realized depends critically on its specific design features, including the level of benefit provided, its financing mechanism and its interaction with existing tax and social security systems.³⁸ Without parallel investments in quality public services and strengthened support for workers' rights, UBI could have detrimental effects for gender equality and social justice. However, well-designed UBI that is integrated into a comprehensive system of social protection, public services and labour market regulations could strengthen women's and transgender and gender-diverse people's income security, lower poverty rates and go some way to redressing inequalities in wealth and income.

This will be perceived by many as a high standard to live up to, and any UBI will have to be rolled out carefully and progressively. Extending the reach of existing social protection

BOX 2:

To what extent could UBI redistribute wealth and challenge structural inequalities?

In the context of the United States, UBI has been proposed by some as one element of addressing racial and gender-based injustices stemming from settler-colonialism, slavery and contemporary drivers of wealth extraction from communities of colour, including through mass incarceration.³¹ UBI has a history of support by Black women's grassroots movements: In the 1960s-1970s, they viewed it as providing a way out of low-status, poor-paying jobs and allowing more time to care for their children, a privilege that white middle-class women had long enjoyed.³² More recently, Black scholars have advocated for a "robust basic income that advances racial and gender justice", in the face of pervasive structural discrimination in employment.³³ In 2018, Black women employed full-time in the United States earned just 65 per cent of the income of their white male equivalents. White women earned 82 per cent as much as white men, and Black men earned 73 per cent as much.³⁴ If financed through taxation on high-income earners, UBI could potentially reach all individuals equally, but with disproportionate benefit and a redistributive effect for already-disadvantaged groups.³⁵

However, in the context of UBI for Indigenous Australians, critics have emphasized that it "does not account for the violence, displacement of nationhood and denial of sovereignty" of Indigenous people, and there is a risk that recognition of the ongoing dispossession of Indigenous communities' land and resources and resistance to it may be silenced or elided if UBI is seen as adequate 'justice' for this suffering, or if UBI governance structures reinforce the power of the state over Indigenous autonomy.³⁶ UBI should therefore not be seen as a "technical fix" to devastating social and economic inequalities and intergenerational trauma.³⁷ Furthermore, more research is needed to compare the redistributive potential of UBI to that of other forms of social protection, and better understand how UBI could be situated within much broader efforts to address systemic racism, challenge the root causes of income inequality, and bring about social justice.

schemes aimed at particular groups—such as social pensions and child and disability benefits—and ensuring that these are unconditional and universally available could be an important stepping stone towards achieving universal income security for all. The main recommendations for States considering UBI are as follows:

- **Follow a rights-based approach to social protection when designing UBI schemes.** This includes following the principles of progressive realization and non-retrogression to safeguard against the rollback of existing social security and labour protections. Like all other social protection schemes, UBI should be anchored in national legal frameworks.
 - **Ensure that UBI is accompanied by parallel investments in quality public services,** including care services, health care, education, housing and food security, and with attention to the rights of women and transgender and gender-diverse people working within these sectors.
 - **Develop sustainable and redistributive financing mechanisms for UBI.** The cost estimates for UBI at national poverty level are substantial, and fiscal trade-offs are likely to arise, especially for low-income and highly indebted countries,
- with implications for gender and other inequalities. These should be assessed and discussed in a transparent, participatory manner during the design phase.
 - **Ensure that UBI schemes address the needs of groups facing multiple and intersecting forms of discrimination.** UBI implementation should be inclusive of incarcerated, migrant, LGBTQI+ and unhoused individuals, and should be embedded in a broader system of support that addresses the additional needs of people with disabilities, pregnant people and the elderly.
 - **Design UBI through national dialogue involving government, civil society, social partners and community representatives** to discuss potential benefits and trade-offs and build societal consensus on the form of the UBI and its integration into broader social protection systems.
 - **Close current gaps in evidence by strengthening monitoring and evaluation of UBI and other cash transfer schemes from a gender perspective, including analysing their impact on groups of women and transgender and gender-diverse people experiencing different intersecting forms of discrimination.**

The policy brief series synthesizes research findings, analysis and policy recommendations on gender equality and women's rights in an accessible format. This brief was written by Loui Williams, Research and Data Section, UN Women.

Endnotes

- 1 'Women' is inclusive of transgender, cisgender, gender-diverse and intersex women. Some women are transgender and/or gender-diverse; the terms are not mutually exclusive. 'Transgender' and 'gender-diverse' are terms that refer to people whose gender identity is different from the sex they were assigned at birth, people whose gender identity is not limited to binary concepts of being either a man or a woman and/or people whose gender expression does not align with societal expectations based on their perceived gender. Specific literature on the impacts of UBI on transgender and gender-diverse people is scarce; however, where possible, this brief discusses transgender and gender-diverse persons alongside women, recognizing that gender-based oppression negatively affects people of many genders under patriarchy. See UN HR Council 2020; OHCHR 2017.
- 2 Guterres 2018.
- 3 Safi 2019.
- 4 World Bank 2020.
- 5 Yang 2019.
- 6 Wignaraja and Horvath 2020.
- 7 Ortiz et al. 2018.
- 8 Standing 2017, World Bank 2019.
- 9 Van Parijs 2004; McLean 2015; UN HR Council 2017.

- 10 See, for example, Lewis 1992.
- 11 World Bank 2020; Cookson 2019; Bateman 2020.
- 12 ILO 2012.
- 13 Ortiz et al. 2018. The study covered a sample of 130 countries.
- 14 Cookson 2019; McLean 2015.
- 15 McLean 2015; Casassas 2016.
- 16 UN Women 2019, Chapter 4; Pateman 2004. Transgender people face significant discrimination by lawyers and judges that is likely to negatively affect their economic outcomes in divorce proceedings. See, for example, Minter 2018.
- 17 Buller et al. 2017.
- 18 Transgender Europe 2019. In response to the income insecurity that is prevalent among the LGBTQI+ community, Catalonia, Spain, and Uruguay have expanded cash transfer schemes to include LGBTQI+ youth and transgender people, respectively. While these schemes are very different to UBI, their unconditional nature makes them notable and innovative approaches to meeting economic need within the community. However, impact assessments are scarce and accessibility barriers likely remain. As will be explored later in the brief, the schemes could form 'stepping stones' towards universal income security for all. See: Ministerio Desarrollo Social 2020 and White 2019.

- 19 Zelleke 2008; Robeyns 2008; Uhde 2018.
- 20 Wright 2005; Baker 2008; Bastagli in World Bank 2020.
- 21 McKay and VanEvery 2000; Bateman 2020.
- 22 World Bank 2020.
- 23 Davala 2019; Davala et al. 2015.
- 24 Ortiz et al. 2018.
- 25 Gideon 2014; Arza 2015.
- 26 Cantillon and McLean 2016.
- 27 Robeyns 2001.
- 28 Vollenweider 2013.
- 29 Friedrich Ebert Stiftung et al. 2019; Gourevitch 2016; Birnbaum and De Wispelaere 2016.
- 30 Van Parijs 2004; UN HR Council 2017.
- 31 Battacharya 2019.
- 32 Miller et al. 2019.
- 33 Warren 2017.
- 34 Institute for Women's Policy Research 2019.
- 35 Lacey 2017; Van Parijs 2004.
- 36 Fouksman and Klein 2019.
- 37 Razza 2017.
- 38 World Bank 2020.

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