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# A basic income to improve population health and well-being in Wales?



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# Executive Summary

In recent years, against a backdrop of global economic recession and subsequent United Kingdom government austerity policies, and more recently in response to the COVID-19 pandemic, there has been a resurgence of interest in an old policy idea – universal basic income.

This report is aimed at decision-makers considering basic income in Wales, in light of increasing interest in the policy. It introduces the concept of basic income, appraises the existing evidence from pre-existing schemes and trials, and explores what steps Wales would need to consider in developing a basic income proposal that has improving health and wellbeing as a key objective. This report does not make formal recommendations; rather, it aims to provide evidence to inform the debate, to support future decision-making, and shape thinking for further research.



## What we found

### Defining basic income and designing basic income schemes is complex and challenging

This report outlines the concept of basic income (see Section 2). Defining basic income is a complex matter, with some contention over whether basic income schemes must be universal (paid to all without means testing) and unconditional (for instance, paid without a requirement to work). There is debate over how basic income should be provided, for instance, whether it should replace entirely or complement existing welfare benefits.

To some extent this myriad of approaches and perspectives is understandable - after all, no two social policies worldwide on a given topic are identical in their aims, objective and remit. There is no 'off the shelf' policy design that can be translated to the Welsh context, nor is there a definitive 'good practice' example of a basic income scheme. The advantage of this is that it allows policy-makers to shape a proposal to meet local context, objectives and ambitions.

A basic income with both improving health and well-being and income security as equal priorities is feasible; however, there remain a range of matters to be addressed and further research to be undertaken. These include the need for full and broad economic modelling related to the Welsh context, and realistic consideration of how basic income could be funded, administered, and delivered in a devolved context.

***There is a need for full and broad economic modelling related to the Welsh context and realistic consideration of how basic income could be funded, administered and delivered in a devolved context.***

### Support for the concept of basic income is growing in Wales and the UK – but criticisms remain

Concepts for basic income pilot schemes and political support from across the ideological spectrum have increased in the last decade (see Section 2).

***A detailed Health Impact Assessment, factoring in the broad potential policy impacts of basic income, would help to better understand the implications of basic income on health and well-being.***

Proponents see basic income as a potential policy response to the challenges of austerity, as a means to reduce anxiety and stress, as a strategy for reducing poverty, and as a riposte to the emergence of increased automation as a risk to the labour market. Public opinion shows a similar concern for the current welfare system, seeing basic income as a 'favourable alternative', and the COVID-19 pandemic has exacerbated many of these concerns (see page 12). Nevertheless, even those broadly supporting basic income question some aspects of the concept, such as how fair and equitable a universal scheme would be.

Similar approaches to basic income include universal public services or a 'universal basic opportunity fund' - these alternative approaches should also be considered by policy-makers seeking policy solutions to current challenges (see page 17).

It is also important to acknowledge that basic income has a number of critics, again across the political spectrum (see page 16). Criticism centres on concerns over the implementation cost, fears over its impact upon the labour market, and the lack of conditionality for some proposals. The contested debate around basic income highlights the need to develop fully-rounded proposals,

taking into account a range of potential eventualities – a detailed Health Impact Assessment, factoring in the broad potential impacts of basic income, would help to better understand the implications of basic income on health and well-being.

### Health improvement is evident in some of the examples from international implementation

This report considers basic income, health and the wider determinants of health in Section 3. There have been relevant findings related to health from implemented basic income schemes over a number of years, most recently from those schemes in Ontario, Canada and in Finland. However, in most cases, caution must be exercised when interpreting these findings due to the limited duration of the pilots or the schemes. In addition, many reports did not consider health outcomes, and there has been limited evaluation of implemented schemes. Findings include:

- An 8.5% decrease in hospital admissions observed amongst recipients of basic income in Dauphin, Manitoba in the 1970s – particularly in relation to accidents, injuries and mental health conditions;
- Less frequent visits to health services were noted in Ontario;
- Over 80% of survey respondents reported improved health in Ontario – an earlier survey of recipients saw 45% report fewer health problems, 88% reported less stress and anxiety and 73% reported reduced depression;
- Better mental health outcomes were noted amongst recipients of the Finnish basic income – lower levels of loneliness and depression were reported, and overall life satisfaction improved.
- From North Carolina's casino dividend scheme, the number of children living in poverty amongst recipient families halved, with behavioural issues reducing by 40%. As the children reached adulthood, a lower prevalence of psychiatric disorders and substance use disorders were observed.

From a wider determinants of health perspective, there has been limited but positive impacts of basic income implementation on an array of policy domains, including in relation to:

- Increasing income security;
- Reductions in child poverty, and improvements in other childhood outcomes;
- Increased social inclusion;
- Improved educational attainment;
- Equity improvements, notably for the disabled and women;
- Greater food security and improved nutrition; and
- Housing quality improvements and more affordable housing options.

***Better mental health outcomes were noted amongst recipients of the Finnish basic income – lower levels of loneliness and depression were reported, and overall life satisfaction improved.***

We also note the World Health Organization (WHO) Regional Office for Europe is considering the potential for basic income as a means to address health inequities, framing the debate as a matter of social justice. The WHO are reviewing how any basic income scheme can be designed to advance health equity.



# Summary - Considerations

The report's conclusion (see pages 38-40) presents key considerations for those seeking to advance the debate on basic income in Wales. In summary:

**Those working to improve population health and wellbeing should familiarise themselves with the key arguments about basic income and consider the potential health impacts from any proposals**

- To make a proposal for basic income robust, proponents must consider what basic income can do to improve health and wellbeing in light of current health status and public policy context.

**Any future basic income proposals need to be credible, contextually appropriate, and clear about the aims and objectives**

- A strong basic income scheme proposal requires a multi-sectoral, multi-disciplinary approach to its design, oversight and day-to-day management and evaluation. Public involvement must be intrinsic at each stage.
- Proposals must also include an appraisal of what is feasible in the context of devolution. This should consider what impact basic income is likely have on both devolved and non-devolved public policy domains.
- A plan to undertake economic modelling, feasibility studies and impact assessments must be developed and delivered as part of the proposal.

**If basic income moves from proposal to pilot, it is important that:**

- There is commitment for the pilot to be of sufficient duration to generate evidence of impact. This commitment should include resourcing of monitoring and evaluation of the pilot. Extensive monitoring of the outcomes associated with basic income is essential – in many cases, existing data sets could be used to deliver this.
- The basic income scheme is delivered by a range of stakeholders. These stakeholders must be committed to the trial and ready to continue delivering the scheme in the long-term, should permanent implementation follow.

# 1. Introduction

**In recent years, against a backdrop of global economic recession and subsequent government austerity policies, and more recently in response to the COVID-19 pandemic, there has been a resurgence of interest in an old policy idea – universal basic income. It is a rare concept in the sphere of public policy as it has supporters and critics from across the political spectrum, from those seeing it as an opportunity to reduce the size of the state and its involvement in people's lives, to those who see it as a stronger form of social protection. Some see basic income as a panacea for a wide range of societal problems, including access to education, gender equity, precarious employment, and ill-health.**

There is no one design of a basic income scheme, although all have in common the transfer of cash to individuals from the state in exchange for very little or nothing at all, turning the existing social contract, with earned income seen as paramount, on its head. Indeed, there are varied definitions and terminology in play; throughout this publication, we simply refer to 'basic income', and the standard definition provided by the Basic Income Earth Network *"...a periodic cash payment unconditionally delivered to all on an individual basis, without means-test or work requirement"*.

The purpose of this report is to inform policy and decision makers about basic income, increase knowledge and understanding amongst stakeholder organisations and the public health system, and contribute to the current discussions and debates. The WHO Regional Office for Europe in 2019 published a report looking at what basic income could mean for health equity, considering basic income in the context of the preventative role that income security can play, and presenting health as a matter of social justice (Haagh and Rohregger 2019). Interest in how basic income could improve health outcomes and health equity is an emerging area of policy discussion worldwide, and this debate has intensified following the emergence of COVID-19, and its observed or anticipated impacts on equity, work and the wider economy.

Basic income is an old idea experiencing a resurgence as governments and policy makers seek solutions to economic insecurity, inequities, community disconnection and the future of work – all challenges that have been exacerbated by COVID-19. Could basic income move beyond the theoretical to practical implementation in Wales, and if so, what impact would this have on the health and well-being of the population?





## About this report

This report is aimed at decision-makers considering basic income in Wales, in light of increasing interest in the concept as part of the response to and recovery from the COVID-19 pandemic. It introduces basic income for those unfamiliar with the concept. It also explores the existing health evidence associated with basic income experiments and pre-existing schemes. Taking a public health approach, we consider health in its broadest sense, highlighting evidence related to the wider social, cultural, economic, and environmental determinants of health.

The report is structured into three distinct sections:

- An introduction to the concept of basic income, including consideration of the outcomes from pilot and fully implemented schemes, current proposals for basic income in the United Kingdom, and criticisms of basic income;
- Analysis of the evidence related to health and well-being and basic income;
- Exploration of what a successful basic income scheme in Wales could look like if it had health improvement as one of its primary aims, along with brief reflection on similar public policy concepts that could be considered as an alternative to basic income.

Text box quotes throughout the report highlight qualitative, anecdotal observations about basic income.

This report was developed prior to the Welsh Government's announcement in May 2021 of a basic income pilot.

## Exclusions

This discussion report does not propose a detailed economic model of what a basic income scheme in Wales could look like, nor scenarios for implementation, and neither does it forecast the level of a basic income that could be offered to individuals.

## COVID-19 and this report

With the seismic shifts that the COVID-19 pandemic and the associated policy responses have introduced to British society and its economy, and with inevitable labour market, societal and economic impacts, basic income has been identified by some as a possible solution to support pandemic recovery. We have reflected upon basic income in the context of COVID-19 in this report, where relevant.

## 2. About Basic Income

This section of the report defines basic income and explores the different forms that a basic income scheme may take.

### Defining basic income

Throughout this report, we refer simply to ‘basic income’ or ‘basic income schemes’ when discussing the concept of basic income. To a large extent, defining basic income is a semantic issue – after all, no two social policies worldwide on a given topic are identical in their aims, objective and remit - but defining basic income remains a complex and contested matter.

Basic income is a form of social security, however how such schemes are constituted and implemented, and how conditional or unconditional they are, vary. The Basic Income Earth Network defines a basic income as ‘a periodic cash payment unconditionally delivered to all on an individual basis, without means-test or work requirement’ (Basic Income Earth Network 2017). Furthermore, the Basic Income Earth Network considers that a basic income features five characteristics:

*“...a periodic cash payment unconditionally delivered to all on an individual basis, without means-test or work requirement.”*

Basic Income Earth Network –  
About Basic Income



**1. Periodic:** it is paid at regular intervals (for example every month), not as a one-off grant.



**2. Cash payment:** it is paid in an appropriate medium of exchange, allowing those who receive it to decide what they spend it on. It is not, therefore, paid either in kind (such as food or services) or in vouchers dedicated to a specific use.



**3. Individual:** it is paid on an individual basis—and not, for instance, to households.



**4. Universal:** it is paid to all, without means test.



**5. Unconditional:** it is paid without a requirement to work or to demonstrate willingness-to-work.

This definition, and the five characteristics outlined, can be considered the classic concept of a basic income scheme. As we shall see throughout this report, basic income schemes are very fluid according to cultural and political context, as are the aims and objectives of the proposed or implemented scheme.

## Form and design of basic income schemes

Basic income schemes can take various forms; table 1 outlines six of the main terms that are used to describe these. The formation of a basic income scheme depends very much on the motivation of those implementing the scheme, notably:

- Whether the scheme is completely unconditional, or if conditions are to be applied on those receiving the income;
- Whether the scheme is entirely universal – for instance, does it apply to all adults, all adults and children, those earning less than a specified amount, or only those who are unemployed;
- Whether the scheme is designed to complement or to replace existing welfare provisions.

Others describe 'full' or 'partial' basic income schemes, but these are very unclear definitions, and thus do not feature in this report.

***"We also believe that basic income can only have a strong impact on the health-damaging conditions of poverty and precarious employment if it is part of, and not a replacement for, a comprehensive approach that includes progress on other key policies and programs."***

Jaeger and Wodchis 2017

***"The economic benefits must be shared with those living alongside these sites and this funding will ensure local people reap the rewards too."***

Exchequer Secretary to the Treasury, Andrew Jones MP, on the Shale Wealth Fund proposal, 2017

***"The only answer is for the state, finally, to catch up to its responsibilities to those who currently work for free, risking personal and financial vulnerability to do important work for the benefit of society."***

Olorenshaw, 2018



Term	Basic Definition	Example Reference/ Scheme
<b>Universal/ unconditional Basic Income (UBI)</b>	All citizens/residents receive a regular, unconditional sum of money. Downes and Lansley consider this in the form of 'a tax-free, unconditional and non-contributory weekly income paid to every individual as of right, irrespective of how much they earned or their work status.'	(De Wispelaere and Stirton 2004; Downes and Lansley 2018, p.1)
<b>Guaranteed Annual Income (GAI)</b>	Mostly commonly seen as a North American term for basic income and guaranteed minimum income models.	Manitoba, Canada (Forget 2011a) [see Case Study on pages 27-28]
<b>Guaranteed minimum income</b>	System of social provision. Normally means tested or with minimum criterion, which adds administrative complexity to the arrangement. Possibly made as only one lump sum payment annually, rather than at regular intervals. Considers how much a person/family requires to have a decent standard of living, factoring in household budget requirements such as housing costs, transport, energy use and food.	B-Mincome pilot, Barcelona [see Case Study on pages 30-31]
<b>Negative income tax (NIT)</b>	Progressive income tax system where people earning below a threshold receive supplemental pay. A model proposed by Friedman would see people earning below the tax-free allowance receiving the unused proportion of their allowances as additional pay from the government – for example, if the tax-free allowances was £10,000, and the person's job earned them an annual income of £8000, the government would credit the person with the extra £2000. This has been interpreted as a form of basic income, but is dependent on the person being in employment – it is not a solution to unemployment-related low income.	(Friedman and Friedman 2002)
<b>Cash Transfers</b>	Direct transfer of money to eligible people. Sometimes a form of humanitarian aid, but also encapsulates Social Security payments.	[In principle] Child Benefit payments
<b>Social/ Citizens Dividend</b>	Payment to a population based on income derived from the exploitation of natural resources. Paid annually rather than monthly or weekly.	Alaska Permanent Fund [see Case Study on pages 26-27]

Table 1 - Summary definitions of the different forms of basic income scheme



## Basic income in the United Kingdom – where are we now?

Concepts for pilot schemes in the United Kingdom have been explored in recent years in national and local politics, public opinion polling, think-tank publications and research projects within academic institutions.



### UK-level political perspectives

The idea of basic income is nothing new to British politics – an article from Sloman (2018) outlines the 100 year history of the concept.

According to Hansard, the first debate about basic income in the Houses of Parliament occurred in 1992 in the House of Lords, with an aim to explore what, if any, progress had been made following recommendations made in a 1982 sub-committee (Hansard 1992). However, it is in recent years, following the economic crash of 2008 and its repercussions, where political perspectives have come to the fore.

The 2019 General Election saw proposals for basic income schemes in major party manifestos. The Labour Party manifesto stated a desire to pilot Universal Basic Income, but was not specific about the details, for example, where, who for, or at what level of income (2019, p.60). The Green Party of England and Wales provided more detail about how they would phase in a universal basic income. They stated that this would be ‘an unconditional financial payment to everyone at a level above their subsistence needs’ with ‘no one currently in receipt of benefits...worse off under UBI’. Further, the Green Party stated that ‘someone earning the minimum wage and working 37.5 hours a week would see their income increase by 10 to 15% through UBI.’ Their proposal would have seen all UK residents receive the income regardless of employment status, and it would replace ‘most income-related benefits’ to ‘simplify and streamline the system.’ An adult rate of £89 per week was proposed, with additional rates for specific groups e.g. pensioners were to receive a total of £178 per week (The Green Party of England and Wales 2019, p.26). The Greens estimated that their proposal would cost around £76bn and would be funded through taxation (BBC News 2019b).

Further details of Welsh political perspectives are provided later in this section (see pages 14-15).

### Public Opinion

In July 2018, Populus, on behalf of the Royal Society of Arts (RSA), undertook public polling on Universal Basic Income (Populus 2018). The RSA highlighted six key findings from this polling (see Box 1) in a subsequent blog post (Painter 2018). Painter describes the survey findings as illustrating ‘deep concern about the current system’s efficacy and a sense of a need for an alternative with Basic Income seen as a contender’.

During the COVID-19 pandemic, academics from the UK and US sought to understand public support in the UK and US for universal basic income as part of the response to the pandemic. 71% of respondents to the first survey (n=802, of which UK respondents n=400) supported universal basic income during a pandemic as compared to normal times, with 20% supporting it equally in both times; this was across all ages, genders and political beliefs. A follow up survey of

- **People view the welfare system as needed to support the most vulnerable**
- **Support for the notion of basic income is significant**
- **Basic income is seen as a 'favourable alternative' to the current welfare system**
- **The costs and targeting of basic income remain concerning**
- **Local experiments are supported**
- **Progressive taxation is seen as a possible route to funding basic income**

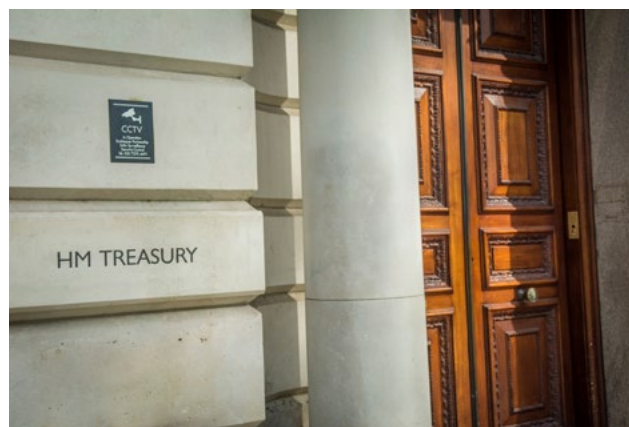
(Painter 2018)

Box 1 - Six findings from the 2018 RSA/*Populus UBI* polling

400 individuals (UK respondents n=200) was conducted, which presented alternative models to basic income. This second study found greater appeal for universal, unconditional approaches (48%) than a more targeted alternative (21%), thus the support for universal basic income was less pronounced than in the first study. Caution is to be exercised when interpreting these findings, as the sample sizes were not nationally representative and thus may not indicate the current state of public opinion. Some participants were concerned that the universality would see money given to the rich who didn't need it, and others were concerned about labour market effects. The simplicity of administration for universal basic income was seen as more of a positive during a period of crisis such as COVID-19, given the potential for universality to reduce anxiety and stress. (Nettle 2020; Nettle et al. 2020).

## The COVID-19 Pandemic: Coronavirus Job Retention Scheme and public opinion

COVID-19 has triggered an historic state intervention into the labour market, in the United Kingdom and in other nations (Kaplan 2020). In the UK, the unprecedented moves to keep people out of the workplace whilst aiming to retain their employment has seen companies in non-critical industries and services able to furlough their employees and claim 80% of their salaries, up to an income of £2,500, from the government. At the time of writing, the scheme has been extended until 30<sup>th</sup> September 2021.



Can the UK Government's economic reaction to COVID-19 be considered a form of basic income? Lutfey Siddiqi of the London School of Economics and Political Science (LSE) included this and similar international responses as one of nine 'policy taboos' overturned by COVID-19, referring to it as 'universal basic income (by any other name)' and questioning whether forms of 'unconditional basic benefits' will have to remain post-COVID-19 (Siddiqi 2020).

Technically, the Coronavirus Job Retention Scheme (HM Revenue & Customs 2020b), and the associated grants through the Self-Employment Income Support Scheme (HM Revenue & Customs 2020a), cannot be considered 'universal' schemes, given that they exist for the furloughed workers and the self-employed, not all working people such as the key workers who have continued to work during the crisis. At best, these policy measures prior to August 2020, would be considered as a very limited form of basic income, albeit time-limited and with conditions attached.



An inquiry into the preparedness of the Department for Work and Pensions (DWP) for changes in the world of work was launched on 14<sup>th</sup> May 2020 (House of Commons Work and Pensions Committee 2020). As part of this, a survey of over 18,000 people was conducted, exploring their experiences of work and how basic income could help people in work and on related issues, such as automation and the changing workplace. 80% of respondents believed the government should introduce basic income, and a further 19% said a temporary basic income should be introduced (Organise 2020). A collection of over 17,000 stories and comments have been mapped to show what people are saying in different parts of the UK about basic income (UBI Lab Network 2020a). At the time of writing, a Committee response or report was not available.

## Academia, Charities, Organisations and Think-Tanks

Various UK-based institutions have contributed to the debate on basic income and findings are included throughout this report. This section provides an at-a-glance overview of the variety of work produced by some of these institutions.

A significant amount of work exploring basic income has been undertaken by the RSA, all of which is supportive of the concept and proposes models and rationale for taking the idea forward. Their first report (Painter and Thoungh 2015) acknowledged that basic income would ‘fundamentally restructure the relationship between the state and the individual’, aligning basic income as a solution to the technological impacts upon jobs and highlighted that basic income could enable entrepreneurial, creative idea and be a much stronger solution than the existing welfare state in alleviating poverty and inequality. A second report explored the notion of a ‘Universal Basic Opportunity Fund’ as a pathway to basic income (Painter et al. 2018) – more details about this alternative model can be found in table 3 on page 21. The third report on basic income from the RSA introduced a typology and toolkit for basic income design and delivery (Young 2018).

The thinktank Compass appraised the merits of basic income in the UK, and considered two distinct models for basic income, concluding that a fully universal scheme would be ‘difficult to implement in the present circumstances...too expensive and there would be too many losers among poorer households’. The authors estimated that a ‘modified’, non-universal scheme would have an estimated net annual cost of around £8bn, but would raise average incomes at the bottom, reduce inequality and reduce poverty levels, particularly child poverty (Reed and Lansley 2016).

Reform Scotland explored the potential for a Basic Income Guarantee as an alternative to the existing welfare system (Mackenzie et al. 2016). Their report finds that the current system causes confusion, and is responsible for a ‘welfare trap’ whereby people are disincentivised from finding work in case they end up earning less than being on benefits. It recommends that ‘everyone in or out of work receives a guaranteed basic income...anything earned goes on top and is taxed at a relevant rate. The Joseph Rowntree Foundation has undertaken work on an alternative concept to basic income, the Minimum Income Standard, more details of which are available in Table 3 on page 21 of this report.

Free-market thinktanks such as the Adam Smith Institute (ASI) and the Institute for Economic Affairs (IEA) have considered basic income with mixed opinions, balancing both the concerns over the current welfare state with the potential expense of basic income proposals and the difficulties of implementation in the case of the IEA (Davies 2019) and, in the case of the ASI, a call to replace many means-tested benefits with a negative income tax, with the aim of guaranteeing a minimum income floor whilst continuing to incentivise work (Story 2015).

The Institute for Policy Research at the University of Bath has led a range of studies on basic income in the UK context, from an economic modelling perspective. Amongst these studies are a report on the distributional and work incentive effects of basic income (Martinelli 2017a) and an exploration of the fiscal and distributional impacts of different models of basic income scheme (Martinelli 2017b). Findings from these studies highlight the challenges of implementation in relation to devolution, and questions over who would fund and deliver basic income and at what payment levels. The studies report that models of basic income scheme that either fully or partially replace the existing benefits system would be both politically and economically unfeasible, with trade-offs between economic and social objectives anticipated.

## Basic income in Wales

*Note – this section of the report was finalised prior to the Welsh Government's announcement in May 2021 of a basic income pilot.*

There has been a growing momentum in the debate for basic income in Wales in the last five years across the political spectrum.

Adam Price, now the leader of Plaid Cymru, raised basic income in a Senedd plenary debate in 2017, asking whether Welsh Government would support a local authority-led pilot of universal basic income. Mark Drakeford, responding in his position as Finance Secretary, confirmed that no local authority had sought support for such a pilot but he would monitor pilot proposals in Scotland and acknowledged the 'clear competency questions to be addressed' (National Assembly for Wales 2017, paras13–20).

Plaid Cymru further proposed a 'youth basic income' to support 18-24 year olds at their 2017 party conference. This model would have included a guaranteed job, a paid 12-month placement, support for further or higher education or a voluntary role in a 'national citizen service' (BBC News 2017; ITV News 2017).

The Conservative MS David Melding published a paper in October 2017, advocating for a range of public policy reforms, including a 'universal income' as a means to support another reform idea, a 'citizens' service' that would see the public called into action for a range of democratic activities similar in concept to how jury service currently operates. Melding stresses that this income would not be used to replace current employment; rather it could be used as an incentive for such things as a citizen's chamber in the Senedd, scrutinising government activity (Melding 2017). Whilst this novel idea does not represent a classic basic income concept, it nonetheless takes some inspiration from the basic income idea.

Eluned Morgan MS, in her Welsh Labour Leadership campaign, supported the idea, suggesting a community-level pilot but acknowledging that it would be 'extremely difficult' without UK Government support (BBC News 2018). First Minister Mark Drakeford, speaking as part of the Hay Digital Festival, also broadly supported the concept, but explained that "you certainly couldn't afford to implement it in Wales from the Welsh Government's resources because most of the things that would go into a basic income are clearly in the hands of the UK Government" and also said that "We have already got elements of it – what is the old age pension if it is not a universal basic for people of retirement age?" The First Minister called for further experiments as there isn't "a fully-fledged universal basic income scheme sitting on anybody's shelf just waiting to be implemented" (#FutureGen - Wales and the World. 2020)



***“UBI is a very real solution to helping people out of poverty and aiding the economy, while reducing society’s gaping inequalities which have grown deeper during this crisis.***

***“Everyone should be paid enough to care for themselves and their families in a time of crisis – if Scotland can discuss this seriously – why can’t we?***

***“The money could support many essential workers and volunteers so they can continue their vital work in keeping the country going – and it could help ease some of the stress on households experiencing extreme difficulties.***

(Future Generations Commissioner for Wales 2020)

The Welsh Liberal Democrats leader Jane Dodds published an article supportive of universal basic income (Dodds 2019). The Liberal Democrats in Cardiff have also provided their support for a proposed pilot of universal basic income in the city (Taylor 2020).

Think-tanks and organisations in Wales have added to the debate. The Bevan Foundation has contributed balanced articles weighing the pros and cons of basic income, highlighting the challenges of implementation, how universal such a scheme would be, and what impact it could have on poverty (Mansoor 2017; Winckler 2020). The Future Generations Commissioner for Wales’ Future Generations Report 2020 has called for a universal basic income, particularly in light of the COVID-19 pandemic – the Commissioner, Sophie Howe, states that UBI is a ‘very real solution to helping people out of poverty and aiding the economy’ (Future Generations Commissioner for Wales 2020). The Centre for Welsh Studies published a report in March 2020, critical about whether universal basic income could be achieved in Wales. This paper considered how a basic income in Wales would be funded, speculating about potential tax-raising mechanisms within Wales’ current powers, such as raising business rates or council tax, and the possible impacts of these changes. The authors conclude that

basic income would ‘fail’ because of concerns over where the funding to introduce it would come from, the effects on business and the labour market, and how the scheme would be administered (Centre for Welsh Studies 2020).

A concept for a pilot in Cardiff came to fruition in June 2020. Though at the very early stage of development, and with a working proposal due to be published imminently, the details released so far would see 5,000 people selected at random to receive £100 a week for two years, with the outcomes from the initiative assessed to determine the potential impacts, should the scheme be expanded on a population basis (Seabrook 2020).

## Criticisms of basic income

The notion of basic income has received criticism, with many critiques mirroring the arguments of advocates, with ideological, economic, health and welfare challenges to the concept. To summarise some of the principal arguments against basic income, Table 2 presents the critiques by theme, with links to further reading.

Theme	Brief Summary	Source
<b>Questioning poverty reduction effects</b>	<ul style="list-style-type: none"> <li>The OECD argue that if the income is set below poverty thresholds, more people would fall into poverty through distributive effects – though their model was based on existing levels of benefit payments and the assumption that all existing benefits would be abolished.</li> <li>A Joseph Rowntree Foundation article has considered that it is not the answer to poverty, and may even exacerbate poverty for children, working-age adults and pensioners compared to the present system in some models.</li> <li>The Centre for Social Justice believe that work is the best route out of poverty, and that any basic income would be no more generous to disadvantaged households than Universal Credit.</li> <li>A London School of Economics paper concludes that ‘if the goal is to reduce, or still better, eliminate poverty...pursuing the mechanism of CI [Citizen’s Income, their chosen terminology for basic income] is heading in the wrong direction’.</li> </ul>	<p>(OECD 2017) (Perkiö 2017)</p> <p>(Goulden 2018)</p> <p>(The Centre for Social Justice 2018)</p> <p>(Piachaud 2016)</p>
<b>Increasing taxation</b>	<ul style="list-style-type: none"> <li>As a riposte to Compass’ 2016 proposal to fund basic income through a rise in income tax for all by 5p, abolishing personal tax allowance and extending National Insurance contributions, Gough considers this model would achieve improvements in child poverty but little else, and was thus ‘a powerful tax engine pulling a tiny cart’.</li> </ul>	<p>(Gough 2018)</p>
<b>Increasing worklessness</b>	<ul style="list-style-type: none"> <li>The Centre for Social Justice consider basic income provides ‘a major disincentive to find work’.</li> <li>Hassel considers that ‘basic income removes the pressure to find work’.</li> <li>The Centre for Welsh Studies state concerns that if a basic income were to be implemented, people would have less incentive to work part-time, highlighting concerns that this could create a shortage in the number of part-time workers in the health care sector.</li> </ul>	<p>(The Centre for Social Justice 2018)</p> <p>(Hassel 2018)</p> <p>(Centre for Welsh Studies 2020)</p>
<b>Basic Income does not go far enough</b>	<ul style="list-style-type: none"> <li>Whitfield believes that basic income wouldn’t improve wealth distribution and ownership, and that the democratisation of wealth is more important than simply creating conditions for ‘enhanced consumption’.</li> <li>Mestrum doesn’t believe basic income to be a progressive solution, citing concerns that basic income wouldn’t necessarily be high enough for a decent standard of living, making it little more than a ‘wage subsidy’ that would do little to change inequality.</li> </ul>	<p>(Whitfield 2018)</p> <p>(Mestrum 2018)</p>
<b>It should not be unconditional</b>	<ul style="list-style-type: none"> <li>Hassel questions why it would be paid to those not needing it – ‘the middle class, who would finance the basic income but would not benefit from it materially, are unlikely to find social justice in this ‘unconditional’ redistribution’.</li> </ul>	<p>(Hassel 2018)</p>

Table 2 - Critiques of basic income

## Alternatives to basic income

Scholars have proposed a range of 'universal' public policy concepts; these are largely theoretical with little or no 'real-world' implementation to date. As these are distinct to basic income, this report does not go into detail about these proposals; however Table 3 provides an illustrative overview for each concept with suggested further reading.

Concept	Summary	Further Reading
<b>Universal Basic Assets</b>	Described as 'a fundamental set of resources that we should strive to give everyone access to', the Institute for the Future proposal considers spaces, natural resources, infrastructure, capital, data, 'know-how', communities and power as assets which could be delivered in basic form to all citizens (Institute for the Future 2019).	(Ward 2017; Schiller 2018; Institute for the Future 2019)
<b>Universal Basic Opportunity Fund</b>	Emerged in a proposal from the Royal Society of the Arts, the premise of which is to give every citizen under the age of 55 a £5,000 'opportunity dividend' to last up to two years, drawn on at the time of the person's choosing within a decade. Dependent children would also be eligible for a payment in the year a parent or both parents were receiving theirs. The rationale for this proposal is to enable citizens to 'adapt to changes in their lives, whether driven by economic change or personal circumstances' (Painter et al. 2018, p.3).	(Painter et al. 2018)
<b>Universal Basic Services</b>	The concept of Universal Basic Services offers an alternative to basic income in that it would provide for people's accommodation, food, healthcare and education on a universal basis, rather than give them an individual income. In comparison to basic income, this model would remove the individual freedom to spend as the individual wishes. In its place, the Universal Basic Services approach would provide people with much of the basics required for daily living.	(Journalista 2017; Social Prosperity Network 2017; Coote et al. 2019)
<b>Universal Child Grants</b>	Seen as a solution to child poverty in developing countries (ODI 2019), this concept has also been considered for Slovenia and Belgium to replace existing child benefits. As outlined in a draft paper (Korošec 2019), fiscal modelling demonstrated that making no overall budgetary changes but replacing 27 schemes with one universal grant of €200 per month (€400 per month for single parent families), child poverty rates drop in first and second income deciles.	(Korošec 2019; ODI 2019)
<b>Minimum Income Standard</b>	Considers a benchmark 'minimum income' to afford a decent standard of living. Based upon consultation with the public to reach consensus on what the material needs are within society, such as cost of clothing, shelter, food, and allows some variation according to household status (e.g. with or without children)	(Hirsch 2010; Davis et al. 2016; Davis et al. 2018; Hirsch 2019)

Table 3 - Overview of alternative 'universal' policy proposals

## Pilot proposals and international case studies – Models and approaches

**This part provides a summary of some proposed models for pilot studies in the UK, along with case studies from international implementation of basic income schemes. These have been chosen to illustrate the different styles and approaches taken to deliver a basic income to citizens in different cities and regions; the examples of case studies have been chosen from developed economies to ensure some potential transferability to the Welsh context. A brief overview of each scheme is presented here; outcomes from the enacted pilots or implemented schemes can be found in Section 3.**

### Pilot scheme proposals

In the last decade, a number of pilot scheme proposals have emerged in the UK, however, at the time of writing, none have been instigated. An umbrella network of cities and regions considering basic income schemes for their area has been established to highlight some of the key proposals across the UK - the UBI Lab Network (UBI Lab Network 2020b). To date, proposals have come from Sheffield, Liverpool, Leeds, the North East Region, Kirklees, Chesterfield, York, Northern Ireland, Norfolk, Birmingham, and Hull. Jakarta and Bucharest have joined as international UBI Labs (UBI Lab Network 2020b). For brevity, this section of this paper highlights the Sheffield and Scotland pilot proposals.

#### Proposed Pilot - Sheffield

UBI Sheffield is one of the more established UBI Lab concepts in the UK, and has resulted in a detailed working paper, with a final proposal published in March 2019 (UBI Lab Sheffield 2018; Bryan and Leman 2019). The authors outline how a universal basic income could be designed and what it would help to achieve. Three pilot models are proposed within the paper. In the first, they outline a pilot centred around removing means testing and sanctions for people claiming disability benefits, that could cost around £18 million to run. The second model, to give all adults £130 per month, without any other changes to the tax and benefits system, would cost around £23 million. The third model would see significant changes to the tax and benefits system, with a standard payment of £6,000 per year for a 'range of residents' and additional funds for retirees, the disabled and those with children. The authors envisage outcome measurement around four main areas:

- Activity: such as impacts on work, volunteering, criminal behaviour and education uptake
- Wellbeing: such as physical and mental health outcomes and behaviours, sense of autonomy, financial security
- Relationships: such as impact on personal relationships and households, community engagement and sense of belonging
- Place: such as quality of housing and interaction with the local environment.

In June 2019, Sheffield City Council supported a motion to trial basic income, though acknowledging that it would need external funding (Centre for Welfare Reform 2019; Gold 2019), with UBI Sheffield seeking to build support for the pilot concept amongst NHS organisations and academic institutions in the region.



## Proposed Pilots - Scotland

The example of Scotland provides a highly-developed concept involving both local action and the direct involvement of the national government. In 2017, First Minister Nicola Sturgeon announced that pilots in Glasgow, Edinburgh, Fife and North Ayrshire would be funded by the Scottish Government (Bott 2017; Farrell 2017). Funding of £250,000 for feasibility studies regarding basic income in the four localities was provided later in 2017, with the Cabinet Secretary responsible noting that the local plans 'will need to be fully aware of the legislative and practical basis for implementing a pilot including the consideration of reserved and devolved powers and administrative complexities'. Further, the Cabinet Secretary noted her proposed engagement with the Department for Work and Pensions (DWP) and 'potentially' Her Majesty's Revenue and Customs (HMRC) regarding the pilots (Constance 2017). A Cross-Party Group in the Scottish Parliament on Basic Income was established in 2018, to examine the options for basic income (Scottish Parliament 2020).

An interim feasibility report and final draft report (Citizen's Basic Income Feasibility Study Steering Group 2019; Citizen's Basic Income Feasibility Study Steering Group 2020) explore the political, financial and ethical feasibility of piloting a citizen's basic income in Scotland, along with how the pilot could be evaluated. The Study Steering Group, comprising representatives from the four proposed pilot local authorities, NHS Health Scotland, the Improvement Service and Scottish Government, have identified a preferred model for the pilots to run over a three year period preceded by a one year 'preparation period' (Basic Income Scotland 2020). Many of the findings of the feasibility study and the considerations would be equally applicable in Wales.

In addition to the feasibility studies, in June 2020, the University of Strathclyde published its economic modelling of a 'Citizen's Basic Income' in Scotland. The report outlines two models for the scheme: a lower level basic income largely replicating existing social security allowances; and a higher level concept, providing slightly more income than those receiving benefits, based upon the Joseph Rowntree Foundation's Minimum Income Standard (See Table 3 on page 21 for further information). They found that the lower level basic income concept would cost around £27bn per annum (gross) in Scotland, with the higher level costing around £58bn. The researchers state that for the lower level example, should standard elements of means-tested benefits, Carers Allowance and Child Benefit be abolished, along with abolishing personal allowances for income tax and reducing state pension payments by the amount of basic income provided, around £19bn would be saved, leaving the government to find around £8bn per annum through other means (Fraser of Allander Institute 2020). They found that 55% of the recipients would gain financially from the lower level scheme, with the number of people in poverty reducing by 280,000 and children in poverty by 90,000 – reductions were larger for the higher-level modelled scheme (University of Strathclyde, Fraser of Allander Institute 2020; University of Strathclyde, Fraser of Allander Institute 2020).

## Case Studies

There are a range of international examples whereby basic income has either been piloted, is currently being trialled, or has been implemented for a substantial length of time. This part of the report focuses on some of the examples from high-income countries.

### Case Study: Finland

#### At-a-glance

<b>Aim</b>	Explore labour market effects; consider basic income as a means to reforming social security
<b>Amount</b>	€560 per month, without means testing
<b>Targetted or universal?</b>	Targeted – 2,000 unemployed people aged 25-58 living in Finland
<b>Timeframe</b>	2017-2018

*Table 4 Finnish experiment at-a-glance. Sources: Ministry of Social Affairs and Health [Finland] 2016; Kela 2020*

The basic income debate in Finland has been a part of political discourse since the 1980s, with representatives of 12 different political parties discussing the concept or similar ideas over four decades (Perkiö 2020). Researchers from Kela, the social insurance agency of the Finnish government, explored basic income in 2015, which was followed by a legislative proposal emerging in 2016 that triggered the first national, statutory and randomised pilot of basic income in the world (Ministry of Social Affairs and Health [Finland] 2016; Kela 2020c).

***“Slightly over half of the respondents (54.8%) in the test group and slightly less than half in the control group (46.2%) considered their state of health to be very good or good”***

(Kangas et al. 2019)

In the Finnish example, the aim was to reform existing social policy with a view to ending disincentives to work and reduce bureaucracy. A consortium featuring three universities, the Finnish Innovation Fund, Federation of Finish Enterprises and others, led by Kela, were commissioned to undertake the preliminary study. Funding of €20 million over two years was given by the Finnish Government for the study. Four models were to be explored and developed, such as full basic income, where the level would be high enough to replace the current insurance-based benefits (Kangas 2015). A review of the models found that unconditional basic income would be ‘quite expensive’, with the chosen partial basic income model expected to consolidate most existing benefits, excluding earnings-related benefits (Kela 2016b; Kela 2016a).

Conclusive findings from this experiment were affected by simultaneous changes to eligibility criteria for unemployment benefits between the two years of the study, which limits interpretation, however as participation in the study was not voluntary, reliable conclusions can be drawn. For the first year, effects on employment were small, with a marginal increase in the number of days in employment amongst basic income recipients, however some also felt a greater pressure to find a job. Participants also felt that they had more autonomy over their lives. There was a marginal increase in those reporting that they were living comfortably or ‘doing ok’ in relation to their household income (Kela 2020c; Kela 2020a).

## Case Study: Alaska Permanent Fund

At-a-glance	
<b>Aim</b>	To distribute 25% of all revenue from the oil industry in Alaska to its local residents
<b>Amount</b>	Ranging from \$331 to \$2,072 per year, dependent on how the investment performs
<b>Targetted or universal?</b>	Universal – paid to all residents of Alaska in the year prior to a dividend claim, unconditionally. Around 637,000 applicants qualified in 2015.
<b>Timeframe</b>	Since 1976, with first dividend payments from 1982

Table 5 - Alaska Permanent Fund at-a-glance. Sources: (Goldsmith 2010; van Parijs and Vanderborght 2017, pp.93–95; Marinescu [no date])

***“The Dividend concept [was] based on Alaska’s Constitution, which holds that Alaska’s natural resources are owned, not by the state, but by the Alaskan people themselves”***

Governor Jay Hammond, from his memoir ‘Tales of Alaska’s Bush Rat Governor’, as cited in van Parijs and Vanderborght (2017)

The Alaska Permanent Fund (APF) is an example of a sovereign wealth fund, whereby the locality builds up a reserve of funds from the proceeds of an intervention, which is then distributed amongst local residents. In the case of Alaska, the proceeds are from exploitation of oil. Between 1959 and 2009, around 16 billion barrels of oil have been produced, valued at \$500 billion, with the state retaining approximately \$150 billion of the total value; this has both funded public services and created a savings pot, the Alaska Permanent Fund. (Goldsmith 2010, pp.1–2)

The fund commenced in 1976, with its primary purpose to invest 25% of the oil industry’s revenues into a fund,

which would then be paid out as a dividend to each Alaskan from then on. The Governor at the time, Jay Hammond, wanted to see the wealth generated to benefit Alaskan residents as well as future generations. With near certainty that oil revenues would continue into the next generation and beyond, the Alaskan government guaranteed a form of income from the fund for future residents (van Parijs and Vanderborght 2017, p.93). These annual payments started in 1982 and continue to the present day.

The long-term implementation of this scheme has allowed substantial findings to be observed. Jones and Marinescu (2020) found that the dividend has had no negative effect on employment, and increased part-time work slightly. Further, they found that the cash dividend helped to support the local economy, with increases in consumption noted in the month that people received their dividend payment (Marinescu 2017).

**Case Study: Dauphin, Manitoba**

<b>At-a-glance</b>	
<b>Aim</b>	Main goal was to assess labour market effects; information on other effects collected as part of the research
<b>Amount</b>	Varied according to household status, e.g. a family with no income would receive 60% of Statistics Canada low-income cut-off
<b>Targetted or universal?</b>	Universal within the town of Dauphin, to those who wished to participate in the trial
<b>Timeframe</b>	1974-1979

Table 6 - Dauphin experiment at-a-glance. Sources: Forget 2011; Forget 2018

***"[In Manitoba] we found a significant reduction in hospitalization, especially for admissions related to mental health and to accidents and injuries, relative to the matched comparison group. Physician contacts for mental health diagnoses fell relative to the comparison group."***

Forget 2011b

This example of a Guaranteed Annual Income scheme was conducted in the province of Manitoba, Canada between 1974-1979, with one particular rural town, Dauphin, with a significant amount of self-employed agricultural workers, offering the income universally to its residents. The trial concluded with no formal evaluation or analysis, however the paperwork from it was retained, leading a researcher, Evelyn Forget, to conduct a retrospective analysis of its findings (Forget 2011b). There were significant health-related findings, which are discussed in Section 3.

The scheme was established following a proposal submitted by Manitoba to the federal Department of National Health and Welfare. In the proposal, Manitoba

anticipated a budget of \$17 million, 75% of which was to be paid for by the federal government, and expected to enrol over 1,000 families to participate in the project. A community in Winnipeg was to be one site, with families chosen randomly to participate, whilst in Dauphin all families would be invited to participate. It was anticipated that there would be four key focus areas for the research: economic effects and the impact on work incentives; sociological effects such as community cohesion; administrative effects; and statistical outputs.

Challenges in establishing the scheme were apparent from the outset. These included debate on who was responsible for conducting the research and administration, dilution of the original focus of the study from an aim to explore work effects towards more focus on administrative issues, and the researchers were directed to 'archive' their findings rather than analyse them. Data collection was only maintained for two years of the four year project. Until 2011, only analysis of the labour market effects amongst the Winnipeg sample were published (Hum and Simpson 1991; Forget 2011b). Government change at the provincial level, and thereafter the loss of political support for the project, was also considered a challenge to the experiment (Forget 2018).

**Case Study: Ontario, Canada****At-a-glance**

<b>Aim</b>	Primary aim to reduce poverty; additional secondary effects including on health, labour market participation and community effects.
<b>Amount</b>	Up to CA\$16,989 per annum for single people CA\$24,027 for couples. People with disabilities received an additional CA\$6,000.
<b>Targetted or universal?</b>	Targetted – limited number of 18-64 year olds.
<b>Timeframe</b>	Was planned for 2017-2020, but concluded in August 2018, with final payments to recipients in March 2019.

Table 7 - Ontario trial at-a-glance. Sources: Government of Ontario 2017; Forget 2018.

***"I was able to search for a good apprenticeship without settling for something less professional."***

Respondent to Ontario survey, from Basic Income Canada Network, 2019

The Ontario experiment was based on the Manitoba scheme's design. Academic and former Canadian senator Hugh Segal was asked to propose ideas for the design of the pilot scheme, and was keen that Ontario should pilot basic income through a structure that tested the impacts on factors such as the province's budget, labour market effects, food security, housing, and health and educational outcomes (Segal 2016). Two key groups were appointed to advise and oversee the pilot: an Advisory

Council, to advise on and oversee the pilot's day-to-day functions, and; a Research Operations Group, with the responsibility to run the pilot.

In this experiment, 1,000 recipients were selected in the Hamilton and Thunder Bay areas, alongside 1,000 control families not in receipt of payments, with 2,000 recipients selected in Lindsay. Those behind the experiment primarily wanted to explore effects on poverty, but also to determine whether basic income could reduce the cost of healthcare provision. This was an example of a refundable tax credit model (Government of Ontario 2017; Forget 2018).

***"I was able to do some necessary home repairs."***

Respondent to Ontario survey, from Basic Income Canada Network, 2019

Pro-active engagement of the health workforce shaped the development of the scheme, with the Association of Local Public Health Agencies and Ontario Public Health Association wrote to the ministers responsible for the basic income pilot scheme development to outline the key health objectives that the pilot could explore, as well as highlighting the potential risk of basic income being seen as a replacement for existing social security policies (Jaeger and Wodchis 2017)

***79% of Ontario's basic income recipients were somewhat or much more motivated to find a better paying job whilst receiving basic income***

Ferdosi et al. 2020

Similar to the Manitoba experiment, a new incoming government changed the outcomes for this experiment. The project was cancelled shortly after provincial elections in 2018, causing uncertainty and worry for the people enrolled into the study, who'd expected a regular form of income until 2020. In August 2018, participants were informed that payments would end in March 2019 in what was termed a 'compassionate wind down',

allowing recipients ‘enough time to transition to more proven support programs without putting an undue burden on Ontario taxpayers.’

Though the trial was cut short, two studies provide learning from the study. Firstly, findings from a survey of recipients conducted after the cessation of the pilot, provide some useful evidence (see Section 3 for findings related to health and well-being). Regarding the early ending of the scheme, in the first study, which had 424 survey respondents (9.4% of all participants in the pilot), 80% felt that their previous problems were returning once the basic income had stopped, with 61% stating that they had cancelled or changed their future plans. 83% felt worried about the cancellation and what it would mean for them (Basic Income Canada Network 2019).

The second study also explores, through interviews and an online survey conducted after the cessation of the trial, how the basic income impacted upon recipients. For the survey, 217 former recipients responded (approximately 20% response rate of all basic income recipients), and for the interviews, 40 recipients were interviewed in July 2019 (Ferdosi et al. 2020). Over 95% of recipients to this study stated that the pilot’s cancellation had caused them to pause or abandon the future life plans that they’d considered when receiving basic income. Further learning about the health and well-being of the recipients from this study is considered in Section 3.

***“I was beginning to lose weight slowly because I could actually afford better options.”***

Respondent to Ontario survey, from Basic Income Canada Network, 2019

### Case Study: B-MINCOME, Barcelona

At-a-glance	
<b>Aim</b>	Improve incomes and civic participation and engagement, test additional social policies
<b>Amount</b>	Varied depending on conditions; between €100 and €1,676
<b>Targetted or universal?</b>	Targeted – 1,000 households based in 10 areas of high deprivation in Barcelona, with variation in what further social support the 1,000 households received
<b>Timeframe</b>	2017-2020

Table 8 - B-MINCOME experiment at-a-glance. Sources: Colini, 2018; Colini, 2019

A guaranteed minimum income pilot (B-MINCOME) was introduced in Barcelona, Spain, and features as a case study in a WHO report into approaches to improving health equity (World Health Organization 2019, pp.83–86). The pilot sought to improve not just the recipients’ earnings, but also their participation and engagement in wider society in 10 areas of high deprivation in Barcelona, and experiment with different social policies such as employment policies (Colini 2018). It aimed to do this through the provision of non-financial social benefits alongside the minimum income e.g. housing improvements. The creation of a local currency also

***“B-MINCOME is effective in reducing the probability of developing mental illness. On average, a reduction of 9.6 points is observed, although a greater effect is detected in the conditional and unlimited groups”***

(Ajuntament de Barcelona 2019)



supported the local economy, enabling local businesses to benefit from new custom, and other opportunities for community engagement and social enterprise have emerged. Tackling urban poverty and social exclusion were clear objectives of the trial, and the trial locations were chosen as they were representative of these particular concerns (Hill-Dixon et al. 2019).

To develop the pilot, Barcelona City Council received a grant from the European Commission for three years (2017-2020), and the Council brought together ‘an alliance of four specialist organisations’, with, for example, The Young Foundation leading the qualitative research into participant experiences (The Young Foundation 2019).

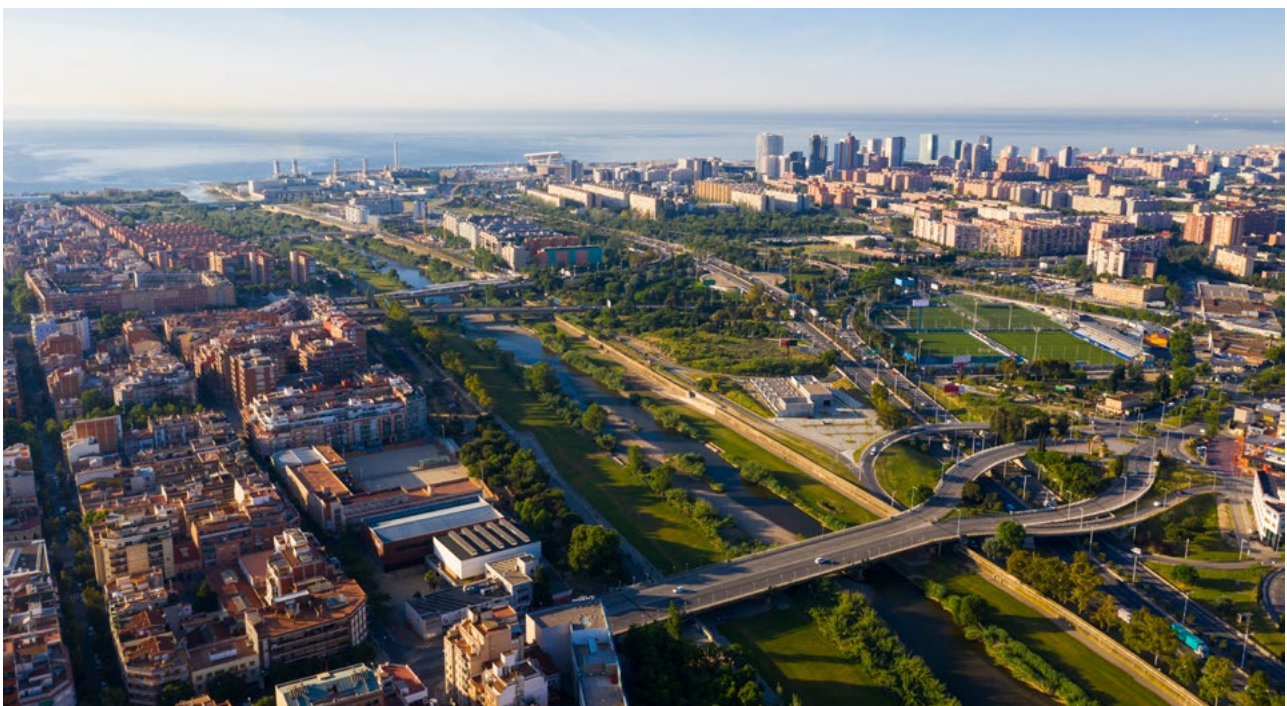
***“With B-MINCOME, I can pay for the school now. We can buy food, we can buy clothes, things for the children...Everything is a little bit better now.”***

Respondent to B-MINCOME  
Preliminary Results evaluation  
(Ajuntament de Barcelona 2019)

From the information available about this pilot in English, preliminary results show health outcomes linked to B-MINCOME (Ajuntament de Barcelona 2019), and its findings have been used to prototype different models and ‘define and implement modular services (health, education, employment).’ Researchers found that the pilot created a shift in emphasis on how social support is delivered, with an increase in peer-to-peer, participative, community-based work in place of institutionalised support.

Further successes included the recognition for a co-ordinated effort amongst services to deliver the pilot, a shift in the power dynamic between communities and their local services, a greater appreciation for people’s needs and improvements in gender equity for women. However, researchers cited the need for greater time and resources to maximise the outcomes from the experiment – only 7 social workers were available to support 1000 families, on top of their regular work; the B-MINCOME project increased the number of people needing social workers (Colini 2019).

However, this experiment was complex in its design, and increased administrative burden, particularly in how the income amount was calculated according to a range of household conditions, such as the age of the child, how many adults in the household, and housing expenditure.



**Case Study: North Carolina**

<b>At-a-glance</b>	
<b>Aim</b>	Provide biannual dividends to Cherokee community members from the proceeds of gambling
<b>Amount</b>	Varies; in 2013, it was reported to be 'around \$7,700', whilst in 2015, it was reported to be 'north of \$9,000' a year.
<b>Targetted or universal?</b>	Universal amongst tribal community – half of all profits held by tribal council, the other half allocated equally amongst 15,000 enrolled members. Children receive a full share, but the money is invested until they graduate from high-school or reach age 21.
<b>Timeframe</b>	In operation since 1997

*Table 9 - North Carolina scheme at-a-glance. Sources: Bowling 2013; Sisk 2015; Costello et al. 2016; Lapowsky 2017; Marinescu [no date]*

Rather than a basic income funded by the state, this example of a cash transfer scheme sees dividends paid to a community effectively as compensation for a casino being built on tribal land, the Harrah Cherokee Casino Resort. It was reported in 2015 that over \$0.5bn was spent by the 3.5 million visitors to the resort (Sisk 2015). The casino operator retains 3% of the annual profits (Lapowsky 2017), with the remaining revenue given back to the community, of which 50% is retained by the tribal council for investment in infrastructure projects or other community services, and the other 50% is distributed unconditionally to the 15,000 members of the tribe. This includes children, for whom the twice-yearly dividends are invested until they reach adulthood. Given the 20+ years this system has been in operation, economists and other researchers have been able to compare the health and economic status of the tribe, observing the powerful effects and outcomes this has introduced. For instance, tribal members who receive the dividend continue to work as much as those not receiving the dividend, have enhanced their education, commit less crime and demonstrate improved mental health and reduced addiction (Marinescu 2017; Marinescu [no date]).

***"A \$4,000 increase in household income reduced the poorest kids' chances of committing a minor crime by 22 percent."***

Lapowsky 2017

Beyond funding individuals, this initiative's funding of the local community has led to significant community-led infrastructure investments. The tribal council has been able to invest some of the reserved fund into a college education fund, transport infrastructure, a water treatment plant, and local medical services, with a new \$80 million hospital funded in 2015 (Sisk 2015; Lapowsky 2017).

### 3. Basic income, health and wellbeing

There has been important learning related to health and the wider determinants of health from implemented basic income schemes over a number of years, most recently from those schemes in Ontario, Canada and in Finland. However, in most cases, caution must be exercised when interpreting these findings due to the limited duration of the pilots or schemes. In this section of the report, a summary of key observations is presented in Table 10. Here, evidence is classified as follows:

- ✓ Observed/anticipated positive impact from basic income
- ? Uncertain/unconfirmed impact from basic income
- ✗ Observed/anticipated negative impact from basic income

Text box quotes throughout this report have illustrated some of the qualitative, anecdotal findings in relation to basic income, and are not repeated in Table 10.



*"It made me feel fabulous. I even started to like my body image again. I didn't like it before, but after I got the membership, I really liked the results that I saw. I definitely looked better."*

Respondent to Ferdosi et al. study, on joining a gym, 2020

*"I'm scared of being without money again! I don't ever want to be in that situation again. I don't want to go back to where I was. I want to keep moving forwards!"*

Respondent to B-MINCOME Preliminary Results evaluation (Ajuntament de Barcelona 2019)

## Basic Income, Health and Well-being – findings from case studies and literature (academic and grey)

Determinant	Evidence
Arts and Culture	<p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>✓ Basic income could <b>enable more leisure time</b> for all the population, leading to 'creative endeavour' (Standing 2017, p.179)</li> <li>✓ Basic income '<b>would give musicians the opportunity to devote more of their time to their creative work</b>' but 'cannot be seen either as additional money for privileged people who don't need it (one of the key arguments against the way state funding of the arts is seen to operate).' (Deller 2018)</li> </ul>
Business, Economy & Employment	<p><b>Alaska</b></p> <ul style="list-style-type: none"> <li>✓ <b>No detrimental effect on employment</b>, and slightly increased number of individuals in part-time work, which may have included both people reducing working hours or entering the labour market (Jones and Marinescu 2020)</li> <li>✓ <b>No change in work patterns</b>, with only 1% of 1,004 survey respondents declaring that basic income resulted in them working less (Isenberg 2017)</li> <li>✓ Kueng (2015) observed <b>increased household spending</b> in connection with the receipt of the Alaska Permanent Fund dividend payment. Authors thought this increase in consumption may stimulate labour market demand and trigger increased employment and wages in the locality (Marinescu 2017)</li> <li>? Given the modest amount of income this scheme provides, scholars couldn't be sure whether the labour market effects would be replicated in other schemes offering more substantial income (Jones and Marinescu 2020)</li> </ul> <p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>✓ <b>Positive and significant effect on financial well-being</b>, across all participation groups (Ajuntament de Barcelona 2019)</li> <li>✓ <b>Reduced need to make additional income</b> through activities such as renting out rooms (Ajuntament de Barcelona 2019)</li> <li>✗ Reduced probability that <b>at least one member of household will be in work</b> (Ajuntament de Barcelona 2019)</li> </ul> <p><b>Finland</b></p> <ul style="list-style-type: none"> <li>✓ <b>No differences in employment status</b> amongst those receiving or not receiving basic income were observed (Kangas et al. 2019), however <b>positive employment effects</b> were noted amongst <b>families with children</b> in receipt of the income, as well those speaking a foreign language (Kela 2020b)</li> <li>✓ Kela (2020b) noted <b>improved financial well-being</b> amongst basic income recipients in Finland</li> </ul> <p><b>Manitoba</b></p> <ul style="list-style-type: none"> <li>✓ <b>No significant labour market effects</b> - men worked 1% fewer hours, women worked 3% fewer hours. Greater shifts found amongst married women, who stayed out of work for longer after childbirth, and 16-year-old high school males, who reduced work because of them extending education (Hum and Simpson 1991, cited in Forget 2018)</li> </ul> <p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>✓ The North Carolina case study demonstrates <b>no negative labour market effects</b>; levels of employment remained stable in recipients of the cash dividend, and the presence of the casino in the community has created new jobs, with the tribal community creating a further 5,500 jobs in 2015 with a new casino building (Sisk 2015)</li> </ul>

<b>Business, Economy &amp; Employment</b> (continued)	<p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Survey data from the Ontario trial showed that 9% of respondents had taken the opportunity presented by the basic income pilot to <b>start or expand their own business</b> (Basic Income Canada Network 2019)</li> <li>✓ Those who worked before the basic income provision continued to work, and in some cases <b>moved to higher paying, more secure jobs</b>, with 79% somewhat or much more motivated to find a better paying job (Ferdosi et al. 2020)</li> </ul> <p><b>Academic Literature</b></p> <ul style="list-style-type: none"> <li>✓ Gibson et al. (2020) found inconsistencies in findings regarding employment effects, but <b>little evidence of large reductions in employment levels</b> from schemes considered a form of basic income</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>? Basic income may lead to a <b>reduced incentive to work</b> (OECD 2017)</li> </ul>
<b>Children &amp; Families</b>	<p><b>Manitoba</b></p> <ul style="list-style-type: none"> <li>✓ <b>No effects in relation to divorce</b> were observed in Manitoba (Forget 2011b)</li> <li>✓ <b>Children may have been greatest beneficiaries of the Manitoba experiment</b>, given that they stayed in school longer, and as they grew into adulthood, they had their first child later and had fewer children over the course of their life (Forget 2018)</li> </ul> <p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>✓ By 2001 – four years after the launch of the casino and its bi-annual dividend payments – the <b>number of children living in poverty</b> in the tribal community had halved, and <b>behavioural issues had reduced by 40%</b> (Costello et al. 2003)</li> <li>✓ <b>Improved child outcomes</b> were also linked to improved parenting, with children citing better interactions with their parents and parents having a greater awareness of their children's activities (Akee et al. 2010)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Two-thirds of respondents to a survey reported somewhat or much <b>better relationships</b> with family members, and <b>more time spent with family members</b> (Ferdosi et al. 2020)</li> <li>✓ 57% of respondents to a survey spent more time with family following provision of basic income (Basic Income Canada Network 2019)</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>✓ A Canadian report considered <b>Canada's Child Benefit (CCB) as a 'basic income guarantee'</b> for families with children, showing that in 2017-18, 277,000 Canadian families were kept above the poverty line as a result of the CCB (Canadian Centre for Economic Analysis 2019)</li> <li>– In 2019, the Scottish charity Aberlour called for a guaranteed income for teenagers leaving care, as a means to preventing homelessness and financial insecurity, to last until their mid-twenties (Yeomans 2019)</li> </ul>



<b>Communities</b>	<p><b>Alaska</b></p> <ul style="list-style-type: none"> <li>– People who have committed a crime leading to imprisonment <b>may be excluded</b> from receiving dividend payments the following year (Marinescu 2017; Chen 2018). It is not known whether this risk of exclusion has had any clear effect upon crime levels in the state.</li> </ul> <p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>✓ Positive effect on probability of <b>volunteering</b> and <b>participating in social leisure activities</b> (Ajuntament de Barcelona 2019)</li> </ul> <p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>✓ 22% decrease in self-reported (to their parents) <b>criminal activity</b> amongst 16 and 17 year olds was noted in North Carolina's casino dividend programme, particularly for drug dealing and minor crimes (Akee et al. 2010; Lapowsky 2017; Marinescu 2017)</li> <li>✓ A community fund has <b>empowered communities</b> to determine what they wish to invest in, such as the local water treatment plant, a college education fund, and paving the local roads (Lapowsky 2017; Marinescu 2017)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Survey data showed 52% of respondents had taken the opportunity presented by the basic income pilot to <b>spend more time with friends</b>, (Basic Income Canada Network 2019)</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>– A thesis found that basic income <b>could create a more inclusive society</b> and address social exclusion better than existing welfare provisions, but cautioned that basic income cannot 'fundamentally alter the mechanisms that create social exclusion' (Flaherty 2015)</li> <li>✓ Cash transfers have been found to <b>improve human capital, reduce risk and uncertainty for individuals, and reduce inequality</b> – 'everyone benefits and the poorest, who suffer disproportionately, benefit most' (Forget et al. 2013)</li> </ul>
<b>Education &amp; Skills</b>	<p><b>Manitoba</b></p> <ul style="list-style-type: none"> <li>✓ Scholars whose families were in receipt of the income were <b>more likely to stay on at school</b> beyond 'Grade 11' than scholars in comparable towns and <b>educational outcomes were improved</b>, which may have been because the higher household incomes allowed parents to invest in educational material for their children. It has also been considered that it may have been the result of more parent time spent with the child (Forget 2011b; Marinescu 2017)</li> </ul> <p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>✓ <b>Increased high-school graduations</b> amongst children whose families were in receipt of the bi-annual dividend payments and <b>improved educational outcomes</b> and <b>better attendance</b> at school (Akee et al. 2010)</li> <li>✓ Some community fund <b>investment in college education</b> – this additional \$4,000 per year for the poorest households added a further year to educational attainment at age 21 (Akee et al. 2010; Sisk 2015; Lapowsky 2017; Marinescu 2017)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Survey data from the Ontario trial showed that 32% of respondents had taken the opportunity presented by the basic income pilot to <b>return to education</b> or further 'upgrade their skills', although the survey had a limited response rate (9.4%, n = 424) (Basic Income Canada Network 2019)</li> <li>✗ 74% of Ontario's basic income recipients <b>didn't start an educational or training course</b> (Ferdosi et al. 2020)</li> </ul>



<b>Energy &amp; Environment</b>	<p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>– <b>No statistically significant changes</b> in relation to <b>energy poverty</b> (Ajuntament de Barcelona 2019)</li> </ul> <p><b>England</b></p> <ul style="list-style-type: none"> <li>– A 2017 consultation considered how the <b>proceeds from shale gas extraction</b> ('fracking') could <b>fund community investment</b>, with around £10 million expected to be raised for each locality where shale gas was to be extracted (HM Treasury 2017a; HM Treasury 2017b). This consultation considered what the funds would be used for and how it would be administered, and included the possibility that households would directly receive payments. Fracking was eventually suspended in November 2019 after concerns about earth tremors (BBC News 2019a).</li> </ul> <p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>✓ The tribal community fund invested some \$26 million of its revenues into a <b>wastewater treatment plant</b>, to provide clean drinking water and sewage facilities, <b>improving environmental health</b> for the community (Sisk 2015; Lapowsky 2017).</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>– In 2019, in Ireland, it was reported that Taoiseach Leo Varadkar supported the <b>idea of a carbon tax</b> where the funds received would go towards a dividend paid back to citizens (Murphy 2019)</li> </ul>
<b>Equity</b>	<p><b>Alaska</b></p> <ul style="list-style-type: none"> <li>✓ Dividend payment shown to <b>reduce poverty amongst rural Alaska Indigenous people</b> by 22% between 2011-2015, a reduction from 46% in 2000 (Berman and Reamey 2016; Berman 2018)</li> </ul> <p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>✓ In relation to <b>gender equity</b>, this pilot increased equity for women, enabling them to access services that they had hitherto not been involved with (Colini 2019)</li> </ul> <p><b>Finland</b></p> <ul style="list-style-type: none"> <li>✓ <b>Speakers of a foreign language</b> in receipt of basic income were found to be more likely to have <b>improved employment outcomes</b> (Kela 2020b)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>– Observed that basic income <b>did not lead people with disabilities to find work</b>; however they reported <b>better health and well-being</b> following receipt of basic income. Further, they reported being <b>more engaged with their local communities</b> and were able to find <b>better accommodation</b> (Ferdosi et al. 2020)</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>✓ Scholars have considered gender perspectives on basic income (Zelleke 2011; McLean and McKay 2015; Basic Income Canada Network 2017; Olorenshaw 2018). Authors considered basic income as a matter of <b>social justice for women</b> who have a number of unpaid roles within the household, such as childcare and other caring responsibilities</li> <li>– Basic income for Canadians with severe <b>disability</b> would 'only replace much of the last-resort welfare program for people with disabilities' but that it would still 'radically improve the lives of hundreds of thousands of persons with disabilities now living in deep poverty...' (Mendelson et al. 2010)</li> <li>✓ A basic income 'grounded in principles of social citizenship' would provide an adequate income for people living with disability (Mays 2016)</li> </ul>

<b>Food</b>	<p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>✓ <b>Reduced worry about eating</b> – between an 16-18% reduction in worries about not having enough food to eat (Ajuntament de Barcelona 2019)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ 28% of study respondents <b>stopped using food banks</b>, 55% purchased food that they couldn't usually afford, and 74% were <b>able to make healthier food choices</b>, though a caveat for interpretation is that this survey had a limited response rate (9.4%, n=424) (Basic Income Canada Network 2019)</li> <li>✓ 69% of studied recipients <b>skipped meals 'somewhat or much less often'</b>, with an <b>increase in regular, balanced meals</b> linked to receipt of the income. 68% <b>accessed a food bank 'somewhat or much less' often</b>. 85% ate nutritious food 'somewhat or much more often' (Ferdosi et al. 2020)</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>✓ Considered that a basic income, by improving household incomes, would see families being able to afford healthier, more nutritious food. Also believed that improving household income would improve healthier food provision and thus <b>reduce direct health care costs</b> (Tarasuk 2017)</li> </ul>
<b>Health Impacts/ Outcomes</b>	<p><b>Alaska</b></p> <ul style="list-style-type: none"> <li>– No research on specific direct health outcomes. Goldsmith (2010) noted that this was due to Alaskan's <b>not thinking of the dividend 'as a tool to address these problems</b> and also...because of the <b>difficulty of identifying the effect of the dividend on these measures independent of all other programs and influences.</b></li> </ul> <p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>✓ <b>Positive impact on the risks of mental illness</b>; a reduction of the probability of developing a mental illness was noted, though with the caveat that 83% of the control group population already had what the researchers term 'a risk of developing a mental illness'(Ajuntament de Barcelona 2019)</li> <li>✓ <b>Increased level of general wellbeing</b> (Ajuntament de Barcelona 2019)</li> <li>✓ Slight improvement in <b>quality of sleep</b> observed (Ajuntament de Barcelona 2019)</li> <li>– <b>No statistically significant changes in self-perceived health</b> status amongst recipients (Ajuntament de Barcelona 2019)</li> </ul> <p><b>Finland</b></p> <ul style="list-style-type: none"> <li>– Survey participants (response rate of 23% from all recipients of basic income) reported <b>better mental well-being</b> than the control group, with improved satisfaction in their lives, and <b>less mental strain, depression and loneliness</b>. Recipients also <b>noted improvements in cognitive abilities</b> such as memory and concentration. Researchers were unable to say whether these findings were directly due to the provision of basic income (Kangas et al. 2019; Kela 2020c)</li> </ul> <p><b>Manitoba</b></p> <ul style="list-style-type: none"> <li>✓ An <b>8.5% decrease in hospital admissions</b> – this was particularly pronounced in relation to <b>accidents, injuries and mental health conditions</b>. No evidence in relation to effects on fertility or delayed childbirth was found, nor was there any evidence in relation to improved birth outcomes (Forget 2011a; Forget 2011b)</li> </ul> <p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>– Since 1992, researchers have followed 1,420 children aged 9-13 in 1992. Early findings four years after the introduction of the dividend payments showed <b>psychiatric symptoms</b> in the 'ex-poor' category of children in the study fell to those of 'never-poor' children following the introduction of the dividend, but there was <b>no significant change in psychiatric symptoms amongst the persistently poor</b> (Costello et al. 2003)</li> </ul>

<b>Health Impacts/ Outcomes (continued)</b>	<p><b>North Carolina (continued)</b></p> <ul style="list-style-type: none"> <li>✓ As these children grew to adulthood, a <b>lower prevalence of psychiatric disorders and substance use disorders</b> was observed in those receiving the income supplement. The most recent assessment in the study reiterates the earlier findings, with <b>those who were youngest at the start of the dividend payments being less likely to have developed mental health issues or substance use disorders</b> (Costello et al. 2010; Costello et al. 2016)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Basic income resulted in less frequent visits to health practitioners and emergency units. 80% of study respondents reported that their health had improved since receiving basic income. 80% reporting <b>improved mental well-being</b>. 83% found <b>paying for medication 'somewhat or much easier'</b>, with 74% reporting the same in relation to <b>paying for dental care</b> (Ferdosi et al. 2020)</li> <li>✓ 41% of survey respondents (N = 424) were better able to purchase medication, with 45% stating that they experienced fewer health problems and 17% able to reduce medication use; 88% reported less stress and anxiety, and 73% reported less depression (Basic Income Canada Network 2019)</li> <li>✗ Following the sudden ending of the trial, anecdotal correspondence from recipients who had endured lifelong mental health and substance use problems, or those with high Adverse Childhood Experiences scores, highlighted concerns over <b>increasing mental health worries because of the unexpected end of the pilot</b>. These were people who for the first time had felt a sense of security from the provision of the income (Forget 2018)</li> </ul> <p><b>Academic Literature</b></p> <ul style="list-style-type: none"> <li>– Sircar &amp; Friedman (2018) hypothesised that basic income <b>could produce positive health impacts</b>, but acknowledged that this would be dependent upon the design of the scheme and whether the financing of it was taken from other social support initiatives.</li> <li>– A scoping review of the public health impacts of basic income concluded that there was <b>little evidence of potential effects on public health</b>, though '<b>strong positive effects</b>' on outcomes such as birthweight and mental health have been observed (Gibson et al. 2020)</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>– Ståhl (2019) looked at basic income through the lens of the <b>relationship between work, welfare and mental health</b>, considering the potential effects basic income could have on <b>improving stress-related outcomes and promote health and well-being</b> generally.</li> <li>– NHS Health Scotland published a briefing outlining the concept of 'universal income', including the case for and against the system, and recommended a '<b>systematic review of the models and impacts (across health and social outcomes)</b> of previous universal income policies' (NHS Health Scotland 2017, p.6)</li> <li>✓ WHO Europe has considered in detail the potential for basic income as a means to address health inequities. This report considered the case for basic income, what success factors could be, and <b>how a basic income scheme can be designed to advance health equity</b>. It also considered what role the WHO could have in any basic income policies enacted (Haagh and Rohregger 2019)</li> <li>✗ Focusing on cash transfer examples from <b>Latin America</b>, WHO highlighted that the '<b>lack of information on health systems impact must be remedied to gain a full understanding of the extent to which CTs [cash transfers] contribute to better well-being</b>' (Forde et al. 2012, p.552)</li> </ul>
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Housing	<p><b>B-MINCOME</b></p> <ul style="list-style-type: none"> <li>– <b>No statistically significant changes in concerns regarding outstanding housing payments</b> (Ajuntament de Barcelona 2019)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Survey data from the Ontario trial showed that 59% of respondents (n=424; 9.4% response rate) had <b>improved their housing situation</b> (Basic Income Canada Network 2019)</li> <li>✓ Several recipients studied <b>moved to higher rent accommodation</b>, 85% reported finding it <b>somewhat or much easier to make basic household purchases</b> such as home safety products and home adjustments for mobility issues (Ferdosi et al. 2020)</li> </ul>
Sport & Physical Activity	<p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ 74% of basic income recipients <b>participated in physical activity ‘somewhat or much more often’</b> (Ferdosi et al. 2020)</li> </ul> <p><b>Grey Literature</b></p> <ul style="list-style-type: none"> <li>✓ May help those with the potential to become elite sports people to commit the time to their training. Standing argued that to some extent this system was already in existence, with the UK Government funding elite athletes through the use of money from National Lottery proceeds, and that this principle ‘<b>recognizes that people need basic security to develop their talents, potential and vocation</b>’ (2017, pp.178–179).</li> </ul>
Transport	<p><b>North Carolina</b></p> <ul style="list-style-type: none"> <li>✓ The tribal council funded the <b>development of new roads</b> through a portion of its basic income revenue (Lapowsky 2017)</li> </ul> <p><b>Ontario</b></p> <ul style="list-style-type: none"> <li>✓ Survey data showed that 20% of respondents (n=424; 9.4% response rate) were <b>better able to afford transportation to work</b>, with 75% less worried about the cost of transportation (Basic Income Canada Network 2019)</li> </ul>

Table 10 - Basic income, health and well-being - observations from case studies and literature

*“I was able to stay at home with my infant daughter while my fiance went back to school and this March when she finishes, I am going back to work”*

Respondent to Ontario survey, from Basic Income Canada Network, 2019

*In Ontario, 28% of survey respondents stopped using food banks, 55% purchased food that they couldn’t usually afford, and 74% were able to make healthier food choices*

Source: Basic Income Canada Network 2019

## 4. Basic income in Wales: taking the next step

**The call for basic income pilots in Wales continues to grow, as do the critiques of the concept. So how can those interested take the debate forward? This section of the report draws on the evidence to identify some key areas for consideration.**

### Be clear about the aims and ambitions from any proposed scheme

Clear aims and objectives for basic income are necessary to make the proposals credible and build support for the initiative. All too often basic income has been put forward as a solution to a vast array of societal issues, without identifying the specific problems basic income could address.

In the Finnish example, the study leads were clear about the remit of the experiment – that is, it was to explore basic income as a potential mechanism for social security reform. The aim of Barcelona’s MINCOME project was to explore the effects of both a guaranteed minimum income in conjunction with a range of other social policies. In the Ontario example, the government aimed to test whether basic income would improve health and education outcomes for people on low incomes and better support vulnerable workers.

Scholars have provided thoughts and lessons on how a basic income pilot could be designed, and the rationales for introducing a basic income, which could aid the development of aims and objectives (Forget et al. 2016; Segal 2016; Young 2018; Standing 2019).

***“Now I’m in a better position to look for work. I can pay to print my CV or to take public transport. I couldn’t do any of that before”***

Respondent to B-MINCOME Preliminary Results evaluation (Ajuntament de Barcelona 2019)

### Identify, approach and engage key stakeholders to become involved in the design

***“Everything has changed. I’ve met people thanks to B-MINCOME. I didn’t talk to Muslims or Pakistanis before..”***

Respondent to B-MINCOME Preliminary Results evaluation (Ajuntament de Barcelona 2019)

Coordination and cooperation between multi-sectoral, multi-disciplinary stakeholders not only improves efficiency, it also improves effectiveness and likelihood of success. The pilot study in Finland and scoping work in Scotland both involved a large number of organisations (Kela 2016b; Citizen’s Basic Income Feasibility Study Steering Group 2020).

Additional stakeholders may be identified through a general public consultation process, which should be conducted at the earliest opportunity, prior to any commitment to a particular scheme design. This enables stakeholders to engage in the design of the scheme, and identify any potential pitfalls; the submission from Ontario’s public health bodies is a good example of this in action (Jaeger and Wodchis 2017). The proposal for Ontario’s pilot experiment presents thinking on a coalition approach to designing and delivering a basic income scheme, with a range of roles and responsibilities for different professionals recommended (Segal 2016).



## **Consider the current policy context and how basic income aligns to existing strategic frameworks**

When considering the potential for basic income in Wales, it is important to look through the lens of existing policy and strategic frameworks and consider how a basic income scheme fits into the current policy context in Wales. In May 2021, the Welsh Government announced a commitment to a basic income pilot.

In Wales, the Well-being of Future Generations (Wales) Act 2015 provides a clear framework, which public bodies are utilising to address the challenges of today and the future. Through the lens of the Act's 'Well-being Goals' and its range of measurement indicators, those working on shaping and developing basic income proposals in Wales also benefit from having a clear idea of some of the current challenges in Wales that basic income may contribute towards, and a framework for how collaborative working could help to resolve some of these challenges, such as alleviating poverty, or improving educational attainment. The existing basic income evidence base, as highlighted in this report and contextualised to Wales, will aid policy framing for a range of health and equity outcomes.

## **Undertake modelling, feasibility studies and impact assessments to explore what basic income could mean in the Welsh context**

Whilst this report highlights a range of different approaches to basic income scheme structures and definitions, what it doesn't, and cannot do is outline in detail how feasible a basic income scheme would be in the Welsh context. This work is a fundamental first step for any interested parties, and a proposal for how such studies could be designed and delivered should be a cornerstone of any basic income proposal. The examples from Scotland, Finland and Ontario provide lessons on how to undertake feasibility studies (Kangas 2015; Segal 2016; Kela 2020a; University of Strathclyde, Fraser of Allander Institute 2020).

## **Factor in the viability of basic income in a devolved context**

The feasibility of introducing basic income in a devolved administration such as Wales needs to be considered. A basic income scheme would, by definition, straddle a range of government departments and policy domains, with some powers fully exercised by Welsh Government (such as education, health, housing) and others that are reserved to Westminster (such as welfare). Taking the example of welfare policy, this remains reserved to the UK Government, so replacing the welfare system within Wales with a form of basic income is not feasible without the full consent of the UK Government.

Nevertheless, it is important to recognise that basic income schemes developed and implemented elsewhere have often been at sub-national level, such as the Alaska Permanent Fund, the Ontario basic income scheme and the Manitoba experiment in the 1970s. Therefore, despite the practical problems inherent with the separation of devolved and reserved powers between Wales and the UK, there may be opportunities for a basic income policy to be possible within the Welsh devolved context. For example, it would require close working between the Welsh and UK Governments to design and implement a basic income scheme. In the Scottish pilot proposals, with Scottish Government is working closely with the UK Government Department of Work and Pensions (DWP) and Her Majesty's Revenue and Customs (HMRC) in relation to the non-devolved welfare powers and tax receipts respectively (Basic Income Scotland 2019).

## Consider how basic income would be delivered, and who would be responsible for delivering the scheme

Examples implemented elsewhere have involved a range of stakeholders in the delivery, monitoring and evaluation of basic income schemes.

As part of Barcelona's B-MINCOME project, stakeholders contributed to the design and delivery of the experiment, with universities undertaking analysis, participatory and ethnographic research; a Third Sector Organisation undertaking surveys; and the city council assisting with impact and economic evaluation. The examples from Ontario and Finland have demonstrated the strength of a collaborative approach to the monitoring and delivery of their schemes.

In the Ontario example, there were two advisory groups established to evaluate the pilot: a Minister's Advisory Council, providing advice and recommendations about the study to the government; and a Research and Evaluation Advisory Committee, to monitor the study.

Forget et al. (2016) recommend that an independent, non-governmental, task force is established to design and deliver a basic income pilot, with an advisory committee comprising various interest groups being established to support the task force.

*"I was able to try out a few different jobs...try new things, see what fits me and what doesn't without having to worry about where my food was going to be coming from."*

Respondent to Ontario survey, from Basic Income Canada Network, 2019

From implemented schemes, a range of institutions have been involved in aspects of the design and delivery of basic income, such as:

- Academia
- Business organisations/federations
- Health Services
- National and local government departments
- Trade unions

Some roles/duties to be determined prior to and in an ongoing basis during the implementation of any basic income scheme may include:

- Economic modelling
- Health analysis and evaluation
- Public policy analysis and evaluation
- Research (qualitative and quantitative) design and delivery

Because of the range of potential impacts and outcomes from any basic income scheme, it is important that a range of organisations and government departments are involved in the delivery of any scheme. For instance, in Ontario, Ministers responsible for Poverty Reduction, Education, Community and Social Services and Housing were all involved in initial consultations exercises.

## Collaboratively develop a monitoring and evaluation plan

In relation to quantitative data, it may be the case that much of what we want to learn from a future basic income scheme already has a data collection method in place, such as the Well-being of Future Generations (Wales) Act 2015 National Indicators, National Survey for Wales, and the Public Health Outcomes Framework (Public Health Wales Observatory 2019), so a new basic income dataset may not be necessary.

Qualitative experiences are vital to understanding the impact of any new public policy. A mechanism for engaging with those in receipt of, and engaged in the delivery of, the scheme will aid the evaluation and monitoring of how the pilot/scheme is functioning and delivering on its aims and objectives.

## 5. Conclusions

**Basic income is a complex policy idea, with ramifications across society – and depending on design and implementation, the outcomes could be both positive and negative. The real-world evidence of effects is promising but inconclusive, especially given the lack of longitudinal evidence. We know that basic income is not merely about incomes – it can be about creating opportunities for work, engagement in the arts, and furthering education. It can be about equity and equality. It could generate a new entrepreneurial age, or it could simply end the pressures of income insecurity as we transition to a more automated age with fewer jobs. Early evidence has shown that basic income has improved income security, educational uptakes, and community participation. However this is based on limited evidence, and there are many areas where there is minimal or no change in outcomes. Basic income as an idea and as a proposal is as multi-faceted and complex as the population whose needs its supporters seek to address.**

Adding to the complexity are the diversity of its proponents and critics. At one stage or another, libertarians, socialists, feminists have all considered a form of basic income, aligned to their particular perspectives, with each ideological grouping, as spectrums in themselves, having both supporters and critics of basic income. Along with emerging grassroots movements promoting basic income as a viable policy option, basic income is becoming increasingly attractive to a range of political parties as a potential means to address a variety of issues. Public health professionals – and public policy professionals – need to enhance their knowledge and understanding about the concept in order to respond to emerging support for the idea.

This report has outlined what a basic income in Wales could look like, and how it could function. It is evident that there is no definitive form of basic income scheme that could be unilaterally applied in any given nation or locality – local context, local legislative frameworks and local priorities matter. Practical problems with developing a rounded and considered proposal for a basic income in Wales are clear when viewed in the devolved context, where the Welsh Government has limitations on its powers, particularly in regards to fiscal policy and welfare, where basic income will need the greatest immediate policy attention. These constraints have been highlighted recently in the proposals in Scotland; it is apparent that these same challenges are transferable to the Welsh context.



To truly understand the impact of a basic income scheme on all sections of society, any pilot proposals must be considered for delivery in areas with diverse incomes, labour market conditions, demographics, health status and education levels, in order to assess the impacts on basic

income across multiple variables. There is opportunity for basic income to provide a significant social return on investment (SROI), however to fully understand this, a detailed cost-benefit analysis will be necessary.

In regard to health, there is currently limited evidence for basic income to address direct health outcomes (see pages 27-34), due to a lack of long-term implementation of basic income in comparative states and health outcomes not being a primary outcome measure. Positive findings have been noted in trials and implemented schemes, which indicate that a basic income scheme can help to reduce poverty, raise income levels and enable greater social mobility, all of which we know are significant contributors to improving health outcomes. In relation to health, decreases in hospital admissions, health service use and reduced stress and anxiety have all been noted. There is an extensive range of evidence in relation to the effects on the wider determinants of health, such as improved educational attainment, increased housing quality and greater food security and better nutritional intake. For some examples, such as increased participation in the arts, evidence on whether changes in these determinants has a direct impact on health is lacking. Therefore, a long-term commitment to any trial must be considered essential to be able to conclusively measure its broad impacts - the short-term nature of the recent experiments limits valid interpretation of their findings, however positive they may appear. A clear and robust evaluation plan is a necessity for any basic income scheme, along with the commitment to appropriately resource this research over the long-term to ensure that the outcomes are measured for the full duration of the scheme.

This report has considered basic income impacts on the determinants of health (see Section 3). For more extensive detail and wider consideration of these matters, it is highly recommended that a Health Impact Assessment is conducted prior to planning for a significant policy development such as basic income; this would invite pro-active engagement with representatives from the sectors and public engagement to consider basic income in the round. A detailed Health Impact Assessment can help to identify and mitigate any concerns and negative impacts. Additionally, sectoral-specific research into the potential impacts of basic income (for instance, the effects on the arts) is recommended to draw out more detailed information on the wider determinants of health.

Changes in health, well-being and economic factors emerging from any basic income scheme should be considered of equal importance; furthermore, the existing policy framework supplied by the Well-being of Future Generations (Wales) Act 2015 provides a lens by which such a wide-ranging policy innovation like basic income could be framed and assessed in Wales. Any prospective basic income scheme should utilise the existing policy frameworks and indicator measurements within Wales.

We also have to consider how any basic income scheme is funded, and whether this in itself could be health-harming. For example, two of the more substantial, long-term schemes with strong societal outcomes are the North Carolina scheme and the Alaska Permanent Fund (see pages 21, 26). These initiatives demonstrate positive improvements for a range of factors for those benefiting from the annual and bi-annual dividend payments, with a commitment to present and future generations in how the funds have been established, and in the case of North Carolina, community infrastructure projects have also been implemented alongside the provision of individual income. Yet, we cannot avoid the fact that these schemes are funded from what are considered health-harming initiatives; gambling and oil extraction, respectively. This calls into question whether this is an acceptable trade-off for the provision of a basic income to improve equity, health and more. What we can take from these examples is the clear evidence that communities can become more equitable and benefit from societal, educational and health



improvements if they are given a greater share in the wealth generated from their community. As we transition into a more environmentally-aware age, one idea often considered is carbon taxing, and how the proceeds from this could be distributed amongst local citizens. Wales, or any other nation, could consider how a percentage of revenues from future energy production developments (including renewable energy) could be given back to the communities affected, similar to how the Shale Wealth Fund was proposed in England.

Prior to the emergence of the COVID-19 pandemic, it is clear that there has been growing interest in the idea of basic income. COVID-19 has increased this level of interest. COVID-19 will undoubtedly represent a significant shock to the economy, to our health, and to many, if not all, other areas of society. Whilst basic income has the potential to improve standards of living and provide a return on investment for individuals and society, it will require significant investment to develop, design and implement a detailed scheme aiming to address the economic challenges that COVID-19 presents. Full economic modelling of a basic income scheme, contextualised to Wales and the Welsh economy, is essential to further the discussion. This would need to include modelling of the potential labour market effects specific to Wales and modelling of different types of scheme approaches and levels of basic income provided.

Basic income is not merely an incomes policy. It has the potential to impact upon many domains of public policy. This means that there a range of policy considerations to turn it from an idea to a workable concept, which reiterates the need for multi-disciplinary planning and delivery of any future scheme. Poor policy design can ultimately make people poorer, risk worsening the conditions we live in, and not achieve the desired policy goals of a basic income. Policy-makers advocating for basic income need to consider what they want such a policy to achieve, how it will be funded over the long-term, what other policies need to change to make basic income a success, and who will be responsible for implementing and administering the policy. Robust impact assessments are essential for this wide-reaching policy idea to garner widespread support, and ultimately to maximise its potential successes.



# Summary - Considerations

**Those working to improve population health and wellbeing should familiarise themselves with the key arguments about basic income and consider the potential health impacts from any proposals**

- To make a proposal for basic income robust, proponents must consider what basic income can do to improve health and wellbeing in light of current health status and public policy context.

**Any future basic income proposals need to be credible, contextually appropriate, and clear about the aims and objectives**

- A strong basic income scheme proposal requires a multi-sectoral, multi-disciplinary approach to its design, oversight and day-to-day management and evaluation. Public involvement must be intrinsic at each stage.
- Proposals must also include an appraisal of what is feasible in the context of devolution. This should consider what impact basic income is likely have on both devolved and non-devolved public policy domains.
- A plan to undertake economic modelling, feasibility studies and impact assessments must be developed and delivered as part of the proposal.

**If basic income moves from proposal to pilot, it is important that:**

- There is commitment for the pilot to be of sufficient duration to generate evidence of impact. This commitment should include resourcing of monitoring and evaluation of the pilot. Extensive monitoring of the outcomes associated with basic income is essential – in many cases, existing data sets could be used to deliver this.
- The basic income scheme is delivered by a range of stakeholders. These stakeholders must be committed to the trial and ready to continue delivering the scheme in the long-term, should permanent implementation follow.

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## 7. Appendices

### Appendix 1 – Search Strategy

All literature considered for this report was searched and downloaded up to and including 9<sup>th</sup> January 2020, with an updated search to capture publications released following the COVID-19 pandemic conducted 28<sup>th</sup> May 2020 – 2<sup>nd</sup> June 2020; any literature published after this date was not considered for this report. The majority of literature was gathered through bibliographic mining and a pre-existing reference list collated by the author over a number of years for previous research.

Deep Google searches were conducted to identify key publications and sources. These search strings were as follows:

- “basic income” and “health” site:.org.uk filetype:pdf
- “basic income” and “health” site:.ac.uk filetype:pdf
- “basic income” and “health” site:.org filetype:pdf
- “basic income” and “health” site:.co.uk filetype:pdf
- “basic income” and “health” site:.com filetype:pdf
- “basic income” and “health” site:.wales
- “basic income” and “health” site:.scot

Additionally, searches were conducted on the following databases:

- SSRN
- Pubmed – search string “(“Basic Income”[Text Word])” on 06/01/2020, giving 29 results, 12 of which were relevant.

The website of the Basic Income Earth Network (BIEN) ([www.basicincome.org](http://www.basicincome.org)) provided signposting to a number of publications and articles.

In total, across all sources, 731 items were screened for inclusion in this work and associated presentations. To aid future research, the full bibliography is available from the author upon request.

# Our Priorities 2018-2030



## Our Values:

*Working together with trust and respect to make a difference*



GIG  
CYMRU  
NHS  
WALES

Iechyd Cyhoeddus  
Cymru  
Public Health  
Wales

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