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Basic income: freedom against solidarity ?

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NB: In order to keep the text short, I packed some developments in footnotes (especially 1, 6, 10, 12). Even so, the text is too long for a keynote lecture. I shall probably shorten drastically the first two sections and concentrate on the last two.

Freedom through solidarity in the pandemic

It is the Covid19 pandemic that forced to think harder about the relationship between freedom and solidarity, and about the relationship between each of them and basic income.

In the Autumn of 2020, governments throughout the world had started adopting more or less repressive measures in order to counter the pandemic. In Brussels and other Belgian cities, demonstrations started being organised against the lockdown, against the obligation to wear masks or show Covid-safe passes, against the prospect of compulsory vaccination. The organisation behind the demonstrations was called *Belgians for freedom*. I had no wish to join them. And this puzzled me. For I was Belgian and had published a book titled *Real Freedom for All*. How could I refuse to join the "Belgians for freedom", and even for "true freedom", as one of their posters put it? Instead, I had sympathy for most of the measures taken by the government in the name of solidarity. This seemed to

imply that I gave priority to solidarity over freedom, and hence that there may be something shaky, or at least seriously incomplete, about the conception of justice summarized in the title of my book — real freedom for all — and hence in the justification offered on that basis for an unconditional basic income.¹

In order to assess this suspicion, it is indispensable to start with some definitions. For present purposes, I shall simply say that a person is *free* to do some thing if it is possible for that person to do that thing. A person is *formally free* to do a thing if it has the right to do it. She is *really free* to do it if in addition she has the means to do it. For example, I am formally free to go to Seoul if I possess a passport and the required visa. I am really free if in addition I have enough resources to pay for the ticket. Needless to say, unlike formal freedom, real freedom is necessarily a matter of degree.

Solidarity on the other hand, can be understood as mutual responsibility, as the disposition or the duty to help each other when in trouble by virtue of being members of some (real or imagined) community: I help you because you are one of us and therefore I could have been you, just as you would help me because you could have been me, because we share an identity, because we are members of the same community. Like charity, solidarity is altruistic. But it differs from

¹ This justification is consonant with those that focus on basic economic security, bargaining power and wealth for all, but not with those that focus on the alleviation of poverty (unless it is understood in a sense that deviates from the standard interpretation as household-level income-poverty by incorporating intra-household poverty and time poverty), or on the reduction of inequality (unless it is understood in a sense that deviates from the standard interpretation as inter-household income-inequality by turning to individual-level inequality in bargaining power, not only in purchasing power), or on the realization of the human right asserted in Article 25 of the Universal Declaration ("*Everyone has the right to a standard of living adequate for the health and well-being of himself and of his family, including food, clothing, housing and medical care and necessary social services, and the right to security in the event of unemployment, sickness, disability, widowhood, old age or other lack of livelihood in circumstances beyond his control*"): the unconditional right to a sufficient income is not quite the same as the right to an unconditional income

charity by virtue of its being intrinsically symmetric, and thereby egalitarian. Like insurance, solidarity covers risks by mutualizing them. But it differs from insurance by virtue of going beyond self-interest: I help you because I consider that I could have been you, even if I know that I shall never be in your situation, for example because I was not born with a serious handicap or in a poor family. Whereas insurance is probabilistic reciprocity, solidarity is hypothetical reciprocity. What I shall call *warm solidarity* is the spontaneous expression or enactment of this disposition, while *cold solidarity* is its institutionalization in a set of legally enforceable obligations and rights.

In this light, it is not too difficult to explain why an advocate of real freedom was under no obligation to join "Belgians for freedom". For what "Belgians for Freedom" were defending was the formal freedom not to wear masks, not to be vaccinated, etc., just as others may try to defend their formal freedom to drive their cars any way they wish. But if and when it can be established with sufficient confidence that the unconstrained exercise of these formal freedoms put other people at risk, indeed may kill them — in this case as a result of contamination —, a coercive legislation guided by solidarity with the more vulnerable members of society is perfectly consistent with the pursuit of justice as real freedom for all: if appropriately designed, it can be an effective instrument in its service.

Freedom beyond solidarity in the welfare state

Can this reassuring convergence between freedom and solidarity be extrapolated from the realm of public health to the realm of social policy and preserve the soundness of the freedom-based justification I offer for an unconditional basic income? When (non-contributory) social assistance developed in some municipalities from the 16th onwards, the justification was initially framed in terms of charity. And when (contributory) social insurance developed in workers' associations from the 19th century onwards, its initial rationale was self-interested

insurance. But with the rise of the nation-state both got gradually integrated into bulky institutions meant to express national solidarity with the nation's sick, handicapped, elderly, unemployed, etc. Cash benefits with floors and ceilings and universally accessible in-kind services are now funded by nation-wide proportional or progressive taxation. This generates systematic ex ante redistribution — not only the ex post redistribution of actuarially fair insurance schemes —, construed as a hypothetically reciprocal deal between equal citizens — not as a charitable transfer from the rich to the poor. In other words, the systems of rights and obligations in which our welfare states consist provide the paramount example of what I called above cold solidarity.

Does this cold solidarity contribute to the pursuit of justice as real freedom of all? Definitely. Making health care available to all, providing economic security in old age, or reducing the poverty of many families are all contributions to the real freedom of some of those with least real freedom. But the institutions that embody cold solidarity are intrinsically conditional: the responsibility to help others when they are in trouble is coupled with these others' responsibility to do what they can to avoid being in trouble and to escape from situations that call for solidarity. While the pursuit of real freedom can make good use of such institutions, it must not restrict itself to them. On the contrary, it implies a presumption in favour of unconditionality and justifies an unconditional basic income granted to the voluntarily unemployed as well as to the involuntarily unemployed, and to those who could get out of poverty through their own efforts as well as to those who could not. In the pursuit of real freedom for all, an unconditional basic income is, along with universal education and a healthy environment for all, an even more important instrument in the service of real freedom for all than the cold solidarity of our traditional welfare states.

This fundamental irreducibility of an unconditional basic income to solidarity is intimately linked to the resistance, indeed often the hostility to basic income

often present in the social-democratic left and, more broadly in organizations close to the labour movement. Some of this negative attitude may have to do with perplexity before a scheme that cannot be viewed either as a form of social assistance or as a form of social insurance. Some of it may also have to do with the self-interest of organizations in charge of managing the existing welfare. But most of it is likely to be linked to a principled attachment to the central place of work and the related inclination towards workfare and activation policies, perfectly consistent with a commitment to solidarity, if necessary at the expense of freedom.

In order to assuage the solidarity-inspired critics, advocates of an unconditional basic income may wish to argue that a less conditional welfare state, though admittedly very imperfect from this standpoint, is still a more effective way of achieving solidarity with the less fortunate than the conditional schemes typical of existing welfare states. In support of this argument, one can invoke higher rates of take up in the target population, the reduction of unemployment traps, or the importance of bringing household work into the picture. However, this remains a feeble strategy, contingent on empirical comparisons with the performance of alternative schemes.

A far more robust strategy consists in flatly saying: yes, an unconditional basic income is unjustifiable in terms of solidarity, it stands "beyond solidarity".² And this is perfectly fine, since justice as real freedom is the ultimate criterion and the institutions that embody cold solidarity just one of the important instruments in its service. Whereas in the case of the pandemic policies, I could consistently side with the advocates of solidarity against the "Belgians for Freedom", in the case of welfare state institutions, commitment to an unconditional basic income must make us opt unashamedly for freedom if not against, at least beyond solidarity.

² "Beyond solidarity" was the title (provocative for the European social policy community) of one of my most popular non-academic essays on basic income (Van Parijs 1996).

Fraternity before freedom ?

Yet, this is not the end of the story, nor for me its most disturbing part. For, as I was forced by the pandemic to think harder about the relationship between basic income, freedom and solidarity, I could not help remembering something that happened in London on the 28th of September 1986. This was just two weeks after a conference I had organized in Louvain-la-Neuve that turned out to be the founding meeting of BIEN, and just two days before I wrote a letter that contained the first written statement of the existence of BIEN and of its purposes.³ The event in question happened at the end of the annual meeting of the September Group, a small group of left-wing scholars of which I have been a member for over forty years. In our youthful days we used to close our meetings with a game, each year a different one. At the 1986 meeting, it consisted in ranking the values of liberty, equality, fraternity, efficiency and self-realisation in the order of the importance we attached to them. I was the only one to rank fraternity on top, followed by liberty, equality and efficiency.⁴

Shouldn't I find this embarrassing? As just mentioned, I was at that time already actively involved in the promotion of the basic income proposal. Moreover, I was

³ « B.I.E.N. The Basic Income European Network has been founded on September 6. Its aim is to serve as a link between individuals and groups committed to or interested in basic income (i.e. in a guaranteed minimum income granted on an individual basis, without means test nor willingness-to-work requirement) and to foster informed discussion on this and related themes throughout Europe. (Philippe Van Parijs, letter sent on 30 September 1986 to the participants in the First International Conference on Basic Income, Louvain-la-Neuve, 4-6 September 1986).

⁴ The Norwegian philosopher Jon Elster, the Polish political scientist Adam Przeworski, the Canadian left libertarian philosopher Hillel Steiner and the Dutch political scientist (and co-founder of BIEN) Robert van der Veen gave the top position to liberty, the Canadian philosopher Jerry Cohen, the American historian Bob Brenner and the American economist John Roemer to self-realisation. Surprisingly for a left-wing group, only one gave priority to equality, namely the American sociologist Erik Olin Wright (who later became one of the most vocal academic advocates of basic income).

also already working on *Real Freedom for All*, published only nine years later after several more versions, a book largely motivated by the determination not to let freedom be appropriated, monopolised, usurped by the libertarian right. And one central aspect of that book consisted in what I believed to be a compelling philosophical justification of an unconditional basic income on the basis of a conception of justice that articulated freedom, equality and efficiency — a subset of the values in our 1986 game that did *not* include fraternity.⁵

Moreover, fraternity is undeniably closely related to solidarity, which I have just argued should be seen as subordinate to real freedom for all, and at best a major instrument in the service of its pursuit. The word "fraternity" (and its equivalents in other languages) predates the word "solidarity" by several centuries. In 1790, Maximilien de Robespierre emancipated it from its Christian origins and made it, in a secularized and nationalized interpretation, the third component of the French revolutionary triad "*Liberté, égalité, fraternité*". The word "solidarité" did not appear until the 1840s, first in French and later in other languages. It was coined by the proto-socialist thinker Pierre Leroux (who also coined the word "socialism" and was popularised at the end of the 19th century by the French political leader Léon Bourgeois, author of a booklet titled *Solidarité* and founder of a school of thought called *solidarisme*. Bourgeois (1893: 59-60) pleaded for "replacing the moral duty of charity formulated by Christianity and the more precise yet still abstract notion of fraternity by the duty of solidarity". "Solidarity" could thus be viewed as a modernized, conveniently gender-neutral term that refers to essentially the same thing as "fraternity".

⁵ Efficiency is involved because, according to this conception of justice, while just institutions must equalize real freedom, they must do so but not beyond the point as from which further equalization impacts economic efficiency to such an extent that the real freedom of those with least real freedom will be reduced, once all effects of the equalization will have materialized.

So, should I simply concede that it was foolish on my part to rank fraternity above all other values? Was it not inconsistent with my making freedom central in my conception of justice and hence also, possibly, with my justification of an unconditional basic income? Perhaps not. But to perceive the consistency, it is crucial to activate at this point the distinction made earlier between cold and warm solidarity. Fraternity is warm solidarity. It refers to relations between people, to what they spontaneously express to each other and do for each other as members of the same (real or imagined) community. Not making it part of justice is not a regrettable omission. Fraternity is a quality of a good society that is extremely important to me but that is fundamentally irreducible to justice.⁶

⁶ In a famous passage of his *Theory of Justice* — the only passage in his writings in which he uses the term “solidarity”, John Rawls (1971: § 17) tried to interpret fraternity so as to fit it into his conception of justice: “*In comparison with liberty and equality, the idea of fraternity has had a lesser place in democratic theory. [...] We have yet to find the principle of justice that matches the underlying idea. The difference principle, however, does seem to correspond to a natural meaning of fraternity: namely, to the idea of not wanting to have greater advantages unless this is to the benefit of others who are less well off. [...] Those better circumstanced are willing to have their greater advantages only under a scheme in which this works out for the benefit of the less fortunate.*” However, this is definitely not a plausible interpretation of the fraternity to which I felt I had to give priority over other values. As G.A. Cohen (1992, 1998) has argued in several articles, insofar as the reason why the difference principle justifies inequalities has to do with incentives, the fact that the worse off benefit from inequalities does not reflect a fraternal conduct on the part of the more talented. On the contrary, it reflects a very unfraternal extortion of a ransom by the better off, who could but would not perform without earning more than others: “*The difference principle can be used to justify paying incentives that induce inequalities only when the attitude of talented people runs counter to the spirit of the difference principle itself: they would need no special incentives if they were themselves unambivalently committed to the difference principle.*” The fraternity I gave priority to is definitely closer to the egalitarian ethos called for by Cohen than to the justification of inequalities on maximin grounds in Rawls’s difference principle. A more plausible way of capturing fraternity or solidarity in a Rawlsian framework — over and above the duty to pay the taxes needed to finance institutionalized solidarity — is through the restriction of his principles of distributive justice to “fully cooperating” members of society and, more concretely, the late-hour inclusion of leisure among the social and economic advantages governed by the difference principle (which is what enabled him to judge that Malibu surfers “would not be entitled to public funds”). This track is proposed more explicitly by Joseph Carens.

No fraternity without freedom

This irreducibility is reminiscent of the sharp distinction between justice and beneficence to be found in Adam Smith's *Theory of Moral Sentiments*. There is, he writes, a virtue "*of which the observance is not left to the freedom of our own wills, which may be extorted by force, and of which the violation exposes to resentment, and consequently to punishment. This virtue is justice.*" By contrast, "*beneficence is always free, it cannot be extorted by force, the mere want of it exposes to no punishment*".⁷ Like Smith's beneficence, fraternity could not be coerced without being destroyed. It is essential to it that it should be free, spontaneous, voluntary, that it should not be made part of legally enforceable justice.⁸ But should it be given priority over justice? In the 1986 game, I gave it

In his critical response to the unconditional basic income proposal, he states that the duty to make good use of one's skills in order to contribute to the social product "*is not only desirable because of its consequences. It is also desirable because of the moral ideal it expresses. That ideal is suggested by the word "solidarity". It is a moral vision of human beings as interdependent and connected, with duties to, as well as rights against, one another.*" (Carens 1986). As argued below, it is essential to fraternal relations (in the sense in which they are independently valued) that they should be voluntary, in the sense of not legally enforceable within a just institutional structure. A third way of trying to fit fraternity into justice (linked to but distinct from Rawls's restriction to "full cooperators") is in terms of cooperative justice: the fair distribution of the burdens and benefits of voluntary cooperative ventures. Cooperative contributions are voluntary to the extent that cooperation itself is voluntary but they are not in the sense that access to the benefits of cooperation can be forcefully restricted to those who contribute their fair share. Acting out of cooperative reciprocity is fundamentally distinct from acting out of fraternity or warm solidarity.

⁷ Smith offers the example of a man who refuses to help his benefactor when latter needs his assistance. "*To oblige him by force to perform what in gratitude he ought to perform [...] would, if possible, be still more improper than his neglecting to perform it.*" And "*what friendship, what generosity, what charity, would prompt us to do with universal approbation, is still more free, and can still less be extorted by force than the duties of gratitude.*" (Smith 1759: 156-57).

⁸ When the common identity is strong, the cost of helping is low and the benefit to the person being helped high, warm solidarity will be perceived as a moral duty. Social sanctions for failing

priority over liberty, equality and efficiency, in that order. But I doubt that I would have given it priority over justice, had it been in the list (as it could plausibly have been), especially if justice is conceived, as it is in *Real Freedom for All*, as a combination of liberty, equality and efficiency.⁹

It is clear to me, however, that fraternity and justice are independently valuable, without one of the two being a sheer means in the service of the other nor enjoying strict lexical priority over the other.¹⁰ Some degree of injustice of our

to show solidarity may then be heavier and hence more effective than many legal sanctions but they remain consistent with freedom.

⁹ For Smith, one of the two virtues is clearly more important than the other: Beneficence, according to him, "is less essential to the existence of society than justice. [...] It is the ornament which embellishes, not the foundation which supports the building, and which it was, therefore, sufficient to recommend, but by no means necessary to impose. Justice, on the contrary, is the main pillar that upholds the whole edifice." (1759: 166-167). His conception of justice, however, is narrower than mine: "The most sacred laws of justice, therefore, those whose violation seems to call loudest for vengeance and punishment, are the laws which guard the life and person of our neighbour; the next are those which guard his property and possessions; and last of all come those which guard what are called his personal rights, or what is due to him from the promises of others." (Smith 1759: 163) It cannot be claimed that the full achievement of justice as real freedom for all is required to "uphold the whole edifice". Some justice deficit can then be considered as a price worth paying for greater fraternity.

¹⁰ In *Real Freedom for All*, I argued that the highest sustainable level of basic income could be boosted by various forms of what I here called fraternity, in particular by "solidaristic patriotism", i.e. loyalty to one's country that makes citizens forego the possibility of higher post tax return to their human capital in another country and thereby switch off or weaken the mechanism of international tax competition. Institutions and the public discourse could legitimately foster such a disposition, just as it could foster Cohen's egalitarian ethos that would make the highly skilled accept higher taxation without reduction of their productive effort, or a nation-wide fellow-feeling that would boost spontaneous compliance with what is expected from the contributors and beneficiaries of institutionalized solidarity (no cheating and no abuse). These various forms of fraternity could be fostered for the sake of a higher sustainable basic income (and hence greater justice as real freedom for all.) And so could a work ethic for everyone, rich and poor, resulting in higher benefits having a smaller income effect on the labour supply of low earners and higher tax rates a lower substitution effect on the labour supply of high earners. But the value I am here recognizing to fraternal relations goes beyond their possible instrumental contribution to a higher sustainable basic income.

institutions could be regarded as legitimate if this could make relations far more fraternal, just as some loss of fraternity could be legitimate if it were the result of making our institutions more just.¹¹ Fortunately, one can reasonably expect that justice and fraternity will tend to strengthen each other. On the one hand, the more fraternal the relations between the members of a society, the more likely it is that just institutions will emerge and stabilize: relations of warm solidarity will facilitate the development of matching cold solidarity institutions and breed support for them, and they will also help securing the conditions for a quest for just institutions and policies through the mechanisms of deliberative democracy.¹²

¹¹ This sentence spells out what it means for there to be no strict lexical priority, but the asymmetry between the two parts of the sentence (“far more” versus “more”) does express a mild lexical priority of justice over fraternity, which I believe I can subscribe to. (See, however, the complexity described in the following footnote.)

¹² This picture, however, is a bit too simple and too rosy. Too simple because it takes a single community as the subject of justice and seat of fraternity. Too rosy because warm solidarity can be intensified through tensions between (sub)communities and cooled by the achievement of a consensus on just institutions or at least a compromise on less unjust ones. If the intensity of warm solidarity is to be maximized, a serious trade off will show up with the pursuit of justice. But this is not how we should think about the pursuit of justice and fraternity as soon as we leave the simple world of a single community.

The ultimate horizons are social justice as global justice and fraternity as universal fraternity. But justice also needs to be constantly pursued and fraternity nurtured at more local levels. For the pursuit of justice, the national level remains the most relevant one because it is the level at which most justice-affecting institutions are located. For the pursuit of fraternity, a more local level is generally more relevant, because that is the level at which we can most easily help each other, because we see better what others need and know better how best to help them.

However, warm solidarity should not remain trapped among people who can most easily identify with each other, within one ethnic group or nation-state. It is particularly valuable, indeed often particularly moving, at the local, national as well as global level, when it crosses the borders of communities and identities. Without belittling the importance of fraternal relations at more homogeneous levels where mutual identification is easier, anything that fosters trans-ethnic and trans-national fraternity must be encouraged, both for its own sake and because of its impact on the emergence and sustainability of just institutions. In other words, we should not go for the exclusive fraternity of Giorgia Meloni’s nationalist *Fratelli d’Italia* (founded in 2012, Italy’s strongest

On the other hand, the more just a society, the more fraternal the relations between its members can be expected to be. One general reason is that people cannot easily identify with their community, nor therefore show warm solidarity with all its members if they feel unfairly treated.¹³ Moreover, if justice is understood as real freedom for all, rather than as proportionality to effort, or labour, or merit (as in conceptions that make something like solidarity part of justice), it will justify institutions that systematically expand the set of options freely usable by those with least options, and therefore make more room for the intrinsically voluntary exercise of warm solidarity. This fraternity can take the form of unpaid activities made possible by the reduction of time poverty for those with least earning power. It can also take the form of the choice of jobs that may be less lucrative than others but include a more fraternal component, whether between the members of the organization or by virtue of the nature of its activity.

In this way, the unconditional basic income and other institutions justified by justice as real freedom for all make more fraternity possible. Whether they will also motivate people to make use of this possibility will depend on the way they are framed. The unconditional basic income is not something we have deserved. Its existence and its size owe nothing to our own effort or merit. It is a gift, and a gift that calls for a counter-gift.¹⁴ If perceived in this way, people who owe all or most of their resources to what is given to them unconditionally by their community can also be expected to contribute voluntarily to the well-being of

party at the 2022 national election), but rather for Pope Francis's universalist *Fratelli tutti* (a phrase used by Francis of Assisi in the 13th century and chosen by Pope Francis for his 2019 Encyclical).

¹³ The argument is analogous to the interpretation of "employment as a partial gift exchange" by economist George Akerlof: if workers have the feeling of being fairly treated by their employer, in particularly by being offered wages higher than what the employer could get away with, they will want to serve the company better than if they felt unfairly exploited.

¹⁴ This interpretation of an unconditional basic income was central in its defence by sociologist Alain Caillé (1994) and has recently been developed by Catarina Neves (2023).

other members of their own community, or indeed to that of members of other communities less well positioned than theirs.¹⁵

However, the background framing of justice as real freedom for all does not only call for warm solidarity on the part of the net beneficiaries of the basic income schemes it justifies. It also calls for warm solidarity on the part of net contributors. The fact that thanks to their talents or other circumstances the latter can earn incomes far in excess of their basic income is also largely the result of a gift for which they can claim no desert. While accepting to do well the jobs that their specific skills and position enable them to perform, they must not try to selfishly appropriate as much as possible of the rent which they are thereby able to fetch from the market. Instead, warm solidarity, here in the guise of “noblesse oblige”, must make them share these rents with other workers, customers or suppliers, or via taxation with their whole community.

If these arguments are sound, the primacy given to fraternity is no longer inconsistent, and we have an answer to our question: Basic income: freedom against solidarity? On one interpretation, the answer is yes: The most fundamental justification of an unconditional basic income is in terms of real freedom for all and is irreducible to the solidarity commonly mobilized to justify the social assistance and social insurance schemes of our traditional welfare states. On another interpretation, the answer is no: While not being — fortunately — a necessary condition for the existence of warm solidarity nor being — alas —

¹⁵ This coupling of basic income with voluntary activities does not correspond to Anthony Atkinson’s “participation income”, a universal social dividend paid not only to waged or self-employed workers and the involuntarily unemployed, but also to people active for a sufficient number of hours in a voluntary organization. As the activities would be required to trigger the payment of a dividend, they would lose its “voluntary” nature. The intrinsic value attached to fraternal relations is at least part of what explains the opposition of voluntary organizations to a participation income, as well as the opposition of those with an experience of a voluntary civic service to its being made voluntary.

a sufficient condition for its ubiquitous flourishing, an unconditional basic income is a powerful enabler of fraternal relations and, if framed properly in public discourse and popular perception, can be a powerful booster of this independently highly valuable quality of our societies.

Consequently, it is perfectly possible to be strongly committed at the same time to freedom and to fraternity, most fundamentally because fraternity, as interpreted, requires freedom. And advocating an unconditional basic income and steps leading to it is the right thing to do for anyone with this dual commitment.

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