

Basic Income and Justice: Reflections for a Debate*

[English Version]

Renta básica y justicia: reflexiones para un debate

Rendimento Básico e Justiça: Reflexões para um Debate

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Abstract

Basic income is the subject of an intense debate, which has been particularly relevant in relation to the concepts of 'distribution' and 'justice'. This is an idea that has developed into a transversal theory. Its scope is evidenced by the fact that it attracts not only left-wing political movements that understand the proposal to defend the extension of real freedom, but also liberals who advocate freedom for all, as opposed to dependence on the state. **Objective:** the purpose of this paper is to analyze and summarize various positions involved in this debate, which explores the relationship between justice and basic income. **Methodology:** the viewpoints of authors such as Van Parijs, Rawls, Dworkin, Nozick, Felipe Giménez Pérez, Daniel Raventós, Amartya Sen and Nancy Fraser were discussed and analyzed. The variety of authors and their analyses enabled for a diversified sample of positions. **Results:** Considering the limits and scope of some of the theoretical approaches focusing on the relationship between justice and basic income, the results of this research allow for a deeper understanding of the sociopolitical challenge of economic inequality through the idea of basic income, both

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on a nation-state scale and on a global scale. **Conclusions:** basic income is presented to us as an instrument in the struggle for social justice in increasingly unequal societies, despite the wealth they generate. In this way, this manuscript aims to understand and present the various positions on the problem of justice and distribution that may arise when discussing basic income. The purpose is therefore to initiate a debate on basic income and integrate it into a common project for creating an inclusive society that is more egalitarian and fair for all.

Keywords: basic income; liberalism; republicanism; utilitarianism; philosophical materialism.

Resumen

La renta básica es objeto de un intenso debate, el cual ha sido especialmente relevante en relación con los conceptos de 'distribución' y 'justicia'. Esta es una idea que se desarrolla como teoría transversal y su extensión se evidencia en el hecho de que atrae a movimientos políticos de izquierda, los cuales han comprendido la propuesta de defender la extensión de una libertad real; pero igualmente, atrae a los liberales, quienes defienden una libertad para todos, opuesta a la dependencia del Estado.

Objetivo: el objeto de este trabajo consistió en analizar y resumir las diversas posiciones participantes en ese debate, el cual indaga la relación entre la justicia y la renta básica.

Metodología: se trataron y analizaron las posiciones de autores como Van Parijs, Rawls, Dworkin, Nozick, Felipe Giménez Pérez, Daniel Raventós, Amartya Sen o Nancy Fraser. Este amplio abanico de autores y su análisis permitió tener una muestra diversificada de las posiciones que el asunto investigado permite. **Resultados:** a partir de considerar los límites y el alcance de algunos de los enfoques teóricos estudiados, que indagan en la relación entre la justicia y la renta básica, los resultados de esta investigación permiten profundizar en el reto sociopolítico de la desigualdad económica; tanto en la escala del Estado-Nación como en la escala global a través de la idea de renta básica.

Conclusiones: la renta básica se nos presenta como instrumento de lucha por la justicia social en sociedades cada vez más desiguales, a pesar de la riqueza que generan. De esta manera, con este manuscrito se ha tratado de entender y presentar las diferentes posturas que ante el problema de la justicia y la distribución se pueden plantear a la hora de tratar la discusión sobre la renta básica, y así debatirla para que se integren en un proyecto común de una sociedad inclusiva; más igualitaria y justa para todos.

Palabras clave: renta básica; liberalismo; republicanismo; utilitarismo; materialismo filosófico.

Resumo

O rendimento básico é objeto de intenso debate, o que tem sido particularmente relevante em relação aos conceitos de "distribuição" e "justiça". Esta é uma ideia que se desenvolve como teoria transversal e a sua extensão é evidenciada pelo fato de atrair movimentos políticos de esquerda, que compreenderam a proposta de defender a extensão da liberdade real; mas igualmente, atrai os liberais, que defendem uma liberdade para todos, em oposição à dependência do Estado. **Objetivo:** o objetivo deste documento era analisar e resumir as várias posições envolvidas neste debate, que explora a relação entre a justiça e o rendimento básico. **Metodologia:** as posições de autores como Van Parijs, Rawls, Dworkin, Nozick, Felipe Giménez Pérez, Daniel Raventós, Amartya Sen e Nancy Fraser foram discutidas e analisadas. Esta vasta gama de autores e a sua análise permitiu ter uma amostra diversificada das posições que o assunto em investigação permite. **Resultados:** ao considerar os limites e o alcance de algumas das abordagens teóricas estudadas, que investigam a relação entre justiça e rendimento básico, os resultados desta investigação permitem-nos aprofundar o desafio sociopolítico da desigualdade económica, tanto à escala do Estado-nação como à escala global, através da ideia de rendimento básico. **Conclusões:** o rendimento básico é-nos apresentado como um instrumento na luta pela justiça social em sociedades cada vez mais desiguais, apesar da riqueza que geram. Desta forma, este manuscrito tentou compreender e apresentar as diferentes posições que podem ser tomadas sobre o problema da justiça e da distribuição quando se discute o rendimento básico, e debatê-lo para que possa ser integrado em um projeto comum para uma sociedade inclusiva; mais igualitária e mais justa para todos.

Palavras-chave: rendimento básico; liberalismo; republicanismo; utilitarismo; materialismo filosófico.

Introduction

Universal basic income has been the subject of intense debate from different political points of view as an economic-political, redistributive and a social justice instrument. In fact, there have been continuous discussions between liberal and leftist positions. We cannot underestimate the concept nor ignore its possible consequences, both of which are very relevant in relation to the concepts of 'distribution' and 'justice'.

Basic income has been presented as a potential solution to a variety of problems including poverty, precariousness, inequality, peacekeeping, climate change, domestic violence, gender discrimination, effective political participation, unemployment, the fulfillment of humanitarian duties, and distributive justice, among others. Laws have developed apparent basic incomes that do not meet such conditions; however, they have appropriated their denomination. This generates a false debate in which terms are confused. There are even those who have developed an alternative political economy theory based on basic income, as is the case of Ramiro Pinto Cañón (2003), author of *Los fundamentos de la renta Básica y la “perestroika” del capitalismo. Teoría alternativa sobre economía política en la sociedad tecnológica y del bienestar*.¹ Similarly, assumptions that oppose basic income for financial reasons have arisen. Such concerns include generating black money, facilitating informal work, encouraging unemployment, promoting welfarism, and prompting a pull factor of migration from developing countries, among others.

The concept of 'basic income'

In *Basic International Earth Network* (n. d.) (the international organization that concentrates a large part of the activity in relation to basic income) gives the following definition: “A Basic Income is a periodic cash payment given unconditionally to everyone on an individual basis, without means test or work requirement” (par. 1). In addition, five characteristics of basic income are indicated:

1. Periodic: paid at regular intervals, not as a one-time grant.

¹ The Fundamentals of Basic Income and the “perestroika” of Capitalism. An Alternative Theory on Political Economy in a Technological and Welfare Society.

Cash payment: payment is made in an appropriate medium of exchange, allowing those who receive it to decide what to spend it on. It is therefore paid neither in kind (such as food or services) nor in vouchers earmarked for a specific use.

3. Individual: paid on an individual basis and not, for example, to households.
4. Universal: paid to all, without means test.
5. Unconditional: paid with no requirement to work or demonstrate willingness to work. (BIEN, 2023, par. 2).

Today, there is a wide variety of basic income proposals circulating, which differ in aspects such as: the amount, the source of financing, certain measurers substituting basic income, etc. Further details exceed the purpose of this work therefore this study will be limited to accepting the general definition. Nonetheless, it is necessary to clarify that it is the plurality of functions described above that justifies the use of the different conceptions of basic income.

What is the justification for a basic income and what is its purpose?

Among the virtues that justify basic income, the most relevant are those that explain its capacity to reduce inequality and poverty. Additionally, it has the ability to intervene in the labor market and affect the development of a new concept of what work means within our society. However, basic income, as explained by Durán and quoted by Pinto (2003), can imply much more. “It does not, in itself, mean a radical transformation of the system since it is possible within capitalism. Nevertheless, it has the potential to be transformative since it attacks the basis of capital head-on, namely, wage labor as the sole source of income”. (Durán, as cited in Pinto, 2003, p. 25).

Basic income can be used to meet three goals: humanitarian, political legitimacy, and distributive justice. These three objectives can be used to eliminate extreme poverty by ensuring all the necessary resources for political rights and freedoms are effective and not just formal; or, to distribute profits or income in the correct way according to the concept of 'justice' The main focus of this paper is distributive justice, however these aspects related to basic income cannot be separated.

Basic Income, Justice and Distribution

Using basic income as a tool of justice requires the need to establish an understanding of it. In order for a global and balanced scope of application, it must be related to the opinion of the social group represented in democratic political institutions, that is, once legitimacy has been guaranteed.

Van Parijs (1995) has offered one of the most articulate defenses based on considerations of distributive justice, explaining that the goal of distributive justice is the distribution of real freedom. In this context, the equitable distribution would be an equal one or, otherwise, one that maximized the allowance for those who have less. This distribution would stem from the idea that some wages are lower due to arbitrary factors (place of birth, social class, talents, etc.). However, this arbitrariness could be eliminated in the distribution of income, as well as in the guarantee of a fair allocation of real freedom by taxing labor income with a high tax—the highest sustainable rate—and then distributing what is obtained among everyone—whether they work or not—in the form of universal basic income.

The idea of basic income arises in Van Parijs (2016) when identifying/discerning errors in leftist policies and thinking: “The left needed to find another perspective, one that went beyond the ways of rearranging the system” (par. 1). There is a lot of Marx in this commitment to praxis, given that it is fundamental human activity that defines man as such and the means by which he produces historical reality resulting in the development of an action and a project leading to a transformation, based on the knowledge of material reality. Van Parijs goes beyond the economy with the basic income and in order to solve them, he addresses the dehumanizing effects of the socioeconomic system. The origin of Van Parijs’ (2016) philosophy is clear when he states: “[...] Marx shared with the utopian socialists: a society in which everyone would contribute voluntarily according to their ability (what may be regarded as paid work or voluntary work) and would receive based on their needs” (par. 3).

Today, Van Parijs (2016) justifies the need for basic income in three main causes. Firstly, the mismatch between growth and unemployment, secondly, the extent of precariousness, and finally, the relationship between climate change and rapid growth. Basic income allows “[...] to propose a vision of the future that offers an alternative to neoliberal servitude as well as to nationalist retreat, to social-democratic bricolage as well as to communist millenarianism” (par. 9), with a global vision of “[...] a conception of social justice as “real freedom”

for everyone, which implies an unconditional income at the highest sustainable level” (par. 10).

Individuals have to discover what kind of society has connection with basic income, supported by both left-wing and liberal positions. That is why Van Parijs explains that “[...] the idea attracts a leftist that has understood that it is about defending the extension of real freedom” (para. 11) and that “[...] the idea appeals to liberals who are horrified by bureaucracy and state protection, and who really want to defend the freedom of all, and not only that of the rich” (par. 12).

It would be the object of another study to deal with what Raventós (2022) explains in this regard:

The main differences between the right-wing and left-wing BI proposals are: 1) In how the basic income is financed, 2) in the economic policy measures that are additionally proposed together with the BI and 3) in the way of understanding the neutrality of the State. (par. 6).

Van Parijs (2016) was clear that from John Rawls principles of justice he not only justified some kind of “social minimum”, but even more specifically its unconditional form. Primarily because Rawls’ *Theory of Justice* (1971), took the concept, the then pioneering, *negative income tax* to exemplify the institutional implementation of the principle of the difference, Van Parijs (2014) also explains that “[...] James Tobin used this concept in a broad sense that covered what he called *demogrant*², that is, precisely a universal basic income” (pp. 174-175). However, Rawls does not accept the idea of basic income:

John Rawls disagreed [...] telling me that contrary to what the difference principle may indeed suggest, his own better judgment was that Malibu surfers could not legitimately claim that public benefits subsidized their lifestyle. (Van Parijs, 2014, p. 175).

Van Parijs (2014) believes that Rawls’ Difference Principle justifies basic income, despite Rawls’ rejection “Ironically, the very move Rawls thought necessary to prevent his theory from granting an unconditional basic income actually made it more akin to the latter” (p. 182). Rawl’s rejection may be due to the belief that if the distribution of property is satisfactory then it is not necessary

2 «In various papers, James M. Buchanan presented a proposal for a '*demogrant*', a form of universal basic income that applied the principles of generality and non-discrimination to taxes and transfers from the scheme and had to be implemented as a constitutional rule outside the realm of everyday politics» (Lehto and Meadowcroft, 2021, p. 145, own translation).

to distribute more welfare. Therefore, the theory requires a division of property that does not require redistribution through universal income.

What about Dworkin and Nozick?

Dworkin's theory (1986) argues that legal practices of a Rule of law are only valid when based on the theoretical idea of equality. Dworkin believes legal conventionalism is presented as a possible interpretation of the determining bases of law. This implies that the ultimate goal of the rule of law is efficiency or similar values such as legal security or authority. The theory therefore presumes that there is a certain view that political and social life is determined by a commitment to the law and its enforcement. This view is based on a kind of pact between conflicting interests, which evolves into a «Community of Principles». In this circumstance, political rights and obligations are not dependent on specific decisions of its members or constituents, but are a consequence of the principles that determine and justify those decisions.

According to the above, basic income is compatible with Dworkin's (1986) statement, as it can be considered as an equal preliminary step to address underprivileged people and compensate for natural inequalities or disadvantages. In this context, people would have identical purchasing power, which would therefore establish a liberal society with equal individuals.

Taking a close look at Nozick's (1988) ideas, it appears he is largely inspired by the political philosophy of John Locke (2005) and offers a moral justification of liberalism and the idea that a maximal State is not any more morally permissible than a Minimum State. On the one hand, Nozick (1988) believes that a free system would be one in which individuals could exercise their rights without restrictions—it includes the right to sell themselves as slaves. On the other hand, the theory is based on the right of ownership that each person has on themselves - this is called "self-ownership". These rights legitimize that there is an unequal appropriation of external goods. Nozick (1988) argues that those who have "external" assets are as free as those who depend on others to live.

It seems clear that the basic income would be incompatible with this way of thinking, as it poses an unresolvable conflict with the legitimization of unequal appropriation. It may be argued that there would be a compatibility if we thought that basic income would contribute to greater autonomy of the individual. However, this viewpoint would be rejected by Nozick (1988) as he denies that there are true social goods — such as basic income — that for their own benefit require the postponement of individual projects.

Consequently, philosophical libertarianism is incompatible with the concept of basic income in contrast with the concept of freedom without conditions or limitations. Furthermore, libertarians believe in a minimum State and believe basic income would go beyond it, as it would imply an unacceptable level of state intervention in both the economy and social life. They even oppose laws that protect people from harming themselves. To oppose any income that could improve the economic situation would fall into a similar category.

Utilitarianism and Basic Income

Utilitarianism, on the other hand, defends that the major principle of morality consists in maximizing happiness for the largest number of people. The proposal for a universal and unconditional basic income from utilitarianism could be accepted because it would result in an increase in obvious general utility through the payment of a universal and unconditional periodic income. (It is completely consistent with the principles defended).

John Stuart Mill (2014) defines this trend as the tendency to seek the greatest possible happiness to human beings and to avoid suffering or pain. Therefore, the search for common happiness becomes the axis of this philosophical trend, as it is recognized in his work *The Utilitarianism*.

If the idea of basic income is accepted as a moral proposal, an ethical project of justice and freedom seeking common happiness, then it must relate to utilitarianism, which is also constructed and related to a moral and ethical way of life. The utilitarian theory can offer an effective justification to the right to a basic income.

The Basic Income from Philosophical Materialism

Giménez Pérez (2007) rejected the idea of basic income in *The basic income Philippe Van Parijs y el "liberalismo auténtico"*. Perez understands it as a link between the idea and the approaches of liberalism, yet also for its effectiveness and feasibility:

The problem is whether such a proposal is feasible. For me it is owned by an empty spirit that has not thought about the repercussions that its implementation

would have on welfare states, which are going through a fiscal crisis that one day could lead to bankruptcy. (p. 18).

This part of his approach is surprisingly similar to Rawls' (1971) theory, although there would be a lack of Malibu surfers in the argument that the American philosopher refers to.

Republicanism and Basic Income

Daniel Raventós exposes this topic in his book *El derecho a la existencia* (Raventós, 1999) and in *Renta Básica de ciudadanía. Filosofía, economía y política* (Raventós, 2006). He states that to have secure material income is indispensable for political independence and competence. The author argues:

A good basic income, understood as a way to guarantee the material conditions of existence, would increase the freedom of citizenship. Basic income would make poor and deprived people more independent, more able to make their voice heard, and to resist to the processes of deprivation that takes place all around in the name of globalization. Basic income would allow the possibility of living without having other peoples' permission. (Raventós, 2006, p. 23).

Furthermore, he believes that basic income “[...] fosters economic independence, and as a result prevents, even partially, a segment of the citizenry from succumbing to some forms of domination” (Raventós, 1999, p. 55).

Amartya Sen and Basic Income

Amartya Sen (2006) questions the concept of 'development' claiming that it is not enough to measure a society. Indeed, he asserts that the concept has a distinct conception of a “good human life”. Despite the fact that he claims, “[...] the promotion of the richness of the entire human life, before that of the economy in which human beings live” (par. 3) this is only part of the development concept. In another article, he suggested that:

[...] in the end, the real debate about globalization has nothing to do with the efficiency of markets or the significance of modern technology; rather the issue is the existence of power inequalities. (Sen, 2000, par. 13).

Sen (1997, 2000, 2006) criticizes inequality and argues that globalization may become a more equitable and effective phenomenon depending on how people act. In other words, institutions by themselves are neither good nor bad, meaning everything depends on how they are used, therefore people can intervene to reduce inequalities. However, the philosopher also believes that political and social commitment cannot be replaced, which is why people must delve into democracy.

According to Sen (2000; 2006), the basic income proposal has limitations. He states that basic income is a means to freedom that affects the set of choices from which a person can choose. However, if freedom is of interest Sen questions whether focusing on the type rather than the extent of freedom that a person truly has is sufficient. Sen believes that equal ownership of property or basic income can coexist with serious inequalities in real freedom. Would basic income solve this issue? He seems to doubt it in his book *Choice, Welfare and Measurement* (Sen, 1997).

Nancy Fraser and Basic Income

Nancy Fraser (2008) proposes redefining the concept of 'justice' in a welfare system. These justice theories must become three-dimensional by incorporating the political dimension of representation, the economic dimension of distribution and the cultural dimension of recognition. All three areas cause economic imbalances and social inequalities which must be addressed.

According to Fraser's theoretical proposal, basic income can make a significant contribution because it affects both the field of injustice in the resource distribution as well as the reduction and balance of iniquity in the areas of recognition and representation. By guaranteeing equal resources as a starting point, basic income would affect the material conditions of existence of the entire population as well as gender equality. In addition, because basic income affects both the objective economy as well as the «symbolic economy», it would also strengthen women's individuality and empowerment in the scope of their representation.

To consider gender equity and the convenience or not of basic income, Fraser establishes seven principles presented in the report *Allí donde se cruzan la renta básica y los feminismos* by Marcos (2018): anti-poverty, anti-exploitation,

income equality, equality of leisure-time, equality of respect, anti-marginalization, and anti-androcentrism.

Fraser contends that when recognition and redistribution are addressed, a conception of justice is complete. Otherwise, it will be cut off. That is why her socioeconomic and feminist concerns are brought together in the article, *Contradictions of Capital and Care*. Fraser (2016) states that:

The current “crisis of care” is rooted in capitalism's inherent social contradiction or, more precisely, in the acute form in which this contradiction is conceived today in financialized capitalism. If that is the case, then this crisis will not be resolved by making minor social policy changes; rather, the path to its resolution will require a profound structural transformation of this social order (p. 132).

As a result, Fraser advocates for «reinventing the distinction between production and reproduction, as well as reimagining the gender order» (Fraser, 2016, p. 132). Any reinvention necessitates ideas and, as she claims, «small social policy changes» are insufficient. The ideas presented must be novel and address unresolved issues, implying changes to the paradigm that is regarded as stable. Basic income is therefore completely consistent with Fraser's approaches (2008, 2016; Fraser & Butler, 2016), as it is presented as a necessary tool for transforming the economic-social order in an era of global feminist thought and practice.

Conclusion

When basic income is discussed, the concepts of 'justice' and 'distribution' are connected, which relates to the parallel idea of what a just society *is* or *should be*. However, as it is to be expected, different interpretations of this relationship exist. For some, basic income could be a tool to protect peoples' lives in a more just and supportive way, putting an end to the destructive globalization and the imposed market despotism, with its degraded labor relations and precarization. For others, basic income may represent a concrete vision of justice that strengthens those with less and, as a result, regulates market dysfunctions. Other points of view add their own nuances, arguments or doubts, but what can indeed be noted is that few people remain passive in the face of basic income.

In this context, basic income is a tool in the struggle for social justice in increasingly unequal societies, despite more and more wealth is constantly being produced in these societies. However, as demonstrated in this article, different

points of view regarding justice and distribution exist when discussing basic income. Once such perspectives have been understood and analyzed, they can be debated in order to be integrated into a larger project aimed at creating an inclusive, more egalitarian and just society for all.

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