AN INVESTIGATION INTO THE RELUCTANCE OF POLITICAL LEADERS REGARDING UNIVERSAL BASIC INCOME

by

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ABSTRACT

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Background:

The article investigates the political leaders' reluctance to implement Universal Basic Income (UBI). The discussion surrounding UBI has been ongoing for a long period of time. The idea of UBI has been tried and tested in many countries such as Kenya, Namibia, Finland and the Netherlands but mostly by private institutions and non-profit organisations. To date, there has been little or no implementation of UBI despite showing a positive outcome in the countries where it was piloted. The onus and commitment rests with political leaders to drive and influence the implementation of UBI.

Main purpose of the study:

The overall aim of this study is to investigate political leaders' reluctance to implement UBI. According to Martin (2016), UBI is money given to every citizen of the country unconditionally, without any requirements. The money is aimed at addressing social injustices such as poverty and the lack of employment opportunities. Therefore, this study sought to gain an understanding of the factors affecting and influencing the implementation of UBI. Furthermore, to examine the existing current social system in order to determine its impact in delaying the implementation of UBI by political leaders and in addition, to explore the funding model that can be used to finance UBI.

Method:

The research methodology used in this study is a descriptive qualitative study, done in the form of a systematic literature review and making use of secondary data which is readily available in journal articles. In total 50 academic articles were selected for this study and were analysed using a thematic analysis technique by using the themes extracted from the academic journals.

Findings:

The 50 selected academic articles were categorised according to the themes identified and analysed through a thematic analysis. The findings of the research are presented in Chapter 3. The findings reveal that UBI has been researched extensively by numerous authors and the studies were done from various countries' perspectives, however, with minimal research conducted in African countries. There are many obstacles hindering the implementation of UBI such as being too costly if compared to the current social system and it is difficult to identify the most suitable resources to finance UBI.

Conclusion:

UBI has been piloted in many countries, however, there are still delays in the implementation. The purpose of this study was to investigate the reluctance of the political leaders to implement the UBI despite the positive outcome where it was piloted. Lack of adequate sustainable resources to fund UBI hinder the implementation due to it being too costly. Moreover UBI could reduce the labour supply and individuals might become lazy and not be willing to work because of free money. Even though the piloted projects have produced positive results however other authors believed the methodology that was followed was bias as it targeted certain individuals. Therefore, further studies still need to be conducted to ensure that a sustainable implementation of UBI in the future .

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LIST OF ABBREVIATIONS AND ACRONYMS

Table 1: Abbreviations and acronyms used in this document

Abbreviation	Meaning
ABDC	Australian Business Deans of Council
MNE	Multi-National Enterprises
TBI	Targeted Basic Income
UBI	Universal Basic Income
USA	United States of America
VAT	Value Added Tax

CHAPTER 1:

INTRODUCTION

1.1. BACKGROUND

South Africans have the right to social welfare which includes basic amenities such as health care services, education, adequate food and clean water to mention a few (South Africa, 1996). The government has introduced various social welfare systems to meet the rights of individuals such as social grants, free education, housing, and sanitation for those who are unable to afford these services. The main purpose of social welfare grants and services is to improve and restore the wellbeing of a country's citizens (Bonciu, 2018). In China, the services and the money provided by the government in the form of social assistance is seen insufficient, as most of China's social welfare needs are not sufficiently covered (Zhen et al, 2017). Universal Basic Income (UBI) can be a model to improve the current social welfare system (Marais, 2020:352-379). UBI is considered as the amount of money given unconditionally to citizens of the country, without any requirement to repay back the money or perform any service in return (Martin, 2016). Bonciu (2018) also indicates that UBI could restore the dignity of impoverished individuals and reduce income inequality.

Many developing countries such as South Africa are still experiencing a high rate of unemployment, inequality, and limited economic opportunities (Statistics South Africa, 2020). According to De Wispelaere and Stirton (2012), UBI serves as a mechanism which can aid in the reduction of income insecurity and the eradication of poverty, therefore, UBI can be used as a model to eradicate social injustices that are not fulfilled by the current social welfare system and thereby, restore the dignity of individuals. Minimal efforts have been made to resolve concerns regarding the non-implementation of UBI (De Wispelaere & Stirton, 2012). Standing (2008) has linked a combination of factors which hinder the implementation of UBI with poor public administration and the inefficiencies found in other social assistance policies as the case of non-implementation of UBI. Additionally, Martin (2016) is of the view that to finance UBI will require direct taxes of up to 40% of income tax. Therefore, a holistic consideration of the factors can most likely disrupt the implementation of UBI. In advocating for the implementation of UBI, Bonciu (2018) states that UBI will give individuals a buying power and this will indirectly strengthen the economy

by creating job opportunities in the labour market. Subsequently, UBI will come as a relief for those which are, or will be threatened by technological developments in robotics and automation (Morley, Ablett & Mays, 2019:18).

UBI has been piloted in countries such as Alaska (Goldsmith, 2010:299), Kenya and European nations such as Italy and Finland (Suplicy & Dallari, 2020). These pilot studies can give an indication of the beneficial impact UBI has on the social welfare of individuals. However, in contrast to this view, De Wispeleare (2015) states that a UBI is not the best policy to implement given the low economic growth in some countries. Eskelinen and Perkiö (2018) and Gan (2019) support this idea by indicating how costly the UBI model is and as a result, governments will not be able to finance it. Moreover, Gilbert, *et al.* (2018), claim that UBI could have an impact on the labour market, especially on low income workers as some individuals will become lazy and not be willing to work.

Although there is no conclusive evidence on why UBI has not been implemented, there are many factors which prevent political leaders making proactive decisions to implement UBI and those factors need to be holistically looked into for the implementation or non-implementation of UBI. Various countries have experimented with the implementation of UBI, some of which have shown positive outcomes with regards to the eradication of poverty and closing the gaps of income insecurity and inequalities among disadvantaged individuals (Hamilton & Martin-West, 2019). This includes individuals who have lost or are on the brink of losing their jobs as a result of a change in technology. However, prior to the implementation of UBI by political leaders, other factors should be taken into consideration such as the availability of funds, the size of the population and tax administration policies to ensure that UBI is implemented effectively and efficiently. (De Wispelaere & Stirton 2012).

1.2. RATIONALE FOR THE STUDY

Though UBI remains a controversial debate among political leaders, the study will add value in understanding how UBI contributes towards the improvement of social welfare. The findings of this study will contribute to UBI literature by providing a stronger basis of understanding, regarding political leaders' reasons for delaying UBI implementation. This understanding will assist policymakers in making more proactive decisions regarding the

implementation of UBI and potentially more decisive actions in favour of a UBI. Furthermore, the study can be used by society at large to close the knowledge gap on UBI and better understand how UBI can improve the standard of living. In addition, this study will serve as a foundation for other researchers to continue research work on the implementation and benefits of UBI.

1.3. RESEARCH OBJECTIVE

The overarching objective of this study is to investigate the reluctance of political leaders regarding the implementation of UBI. More focused objectives include:

- To determine the factors that influence the implementation and non-implementation of UBI.
- To determine the reasons why political leaders are continuing on the current social grant system even though this system has not addressed the concerns raised by society in general.
- To assess the strategic plan put in place by the political leaders to address poverty, unemployment, and the impact of technology and how it affects the human labour market.
- To determine the funding model and costs associated with UBI.

The following research questions will assist in finding answers to the research objectives, namely:

- What are the factors that influence the implementation and non-implementation of UBI?
- Why the current social system is preferred by political leaders despite not addressing poverty, inequalities and unemployment?
- What are the factors that are being put in place by political leaders to address poverty, unemployment, and other social injustices as well as the change in technology?
- How much will it cost the government to finance the implementation of UBI? and
- What will be the most suitable funding model for the implementation of UBI?

1.4. DESIGN AND METHODOLOGY

The current research is a descriptive qualitative study, done in the form of a systematic literature review. Gurevich (2005) contends that a descriptive qualitative study is an

evaluation of secondary data (readily available academic journals) for observation and to establish a pattern in order to accomplish the research objectives and thereby find answers to the research questions. A systematic review is performed by using a rigorous and well-documented search strategy (Mallett *et al.*, 2012:445-455).

This systematic literature review incorporates relevant and carefully selected journal articles concerning the reluctance of political leaders to implement UBI. This method was chosen because the study will use secondary data that can be retrieved from databases such as ProQuest, EBSCOhost and Emerald. The study has adopted a cross-sectional time dimension. All literature will be taken from a period of 16 years ranging from the years 2004 to 2008 (5 years) and 2010 to 2020 (11 years).

1.5. MAIN CONSTRUCTS OF THIS STUDY

The current research follows a systematic literature review research methodology using secondary data which is readily available in journal articles. The software program called Qiqqa was used to arrange, tag and categorise the relevant literature selected for this study in order to establish the main constructs of the study and to find answers for the research question on the reluctance of political leaders to implement UBI. The themes or constructs identified from the selected academic journals are discussed below.

1.5.1. Implementation and non-implementation of UBI

The discussion surrounding UBI has been an ongoing controversial debate amidst political leaders, governments, business people, and society in general (Banerjee *et al.*, 2019). Renowned individuals such as Martin Luther King, Richard Nixon, and the economist, Friedrich Hayek supported the implementation of UBI as a means of addressing the problem of income insecurities. However, to date, UBI is merely piloted in various developed and developing countries such as Alaska (Goldsmith, 2010:299), India (Bharat, S.E.W.A. & UNICEF, 2014) and Kenya (Suplicy & Dallari, 2020) instead of being implemented and all these pilot projects have shown positive outcomes. UBI has been subjected to both criticism and advocates and both appear to have compelling arguments in theory as to why UBI should or should not be implemented (Zhen *et al,* 2017). Mitchell and Watts (2005) advocate for the implementation of UBI, and allude that slow economic

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growth and lack of job opportunities have left many individuals vulnerable. An inability to find work opportunities and an increase in the retrenchment rate due to technological development in robotic and automation, are the major contributing factors for the lack of income insecurity (Mitchell & Watts, 2005). The implementation of UBI could be the solution to resolve income insecurity (Banerjee *et al.*, 2019). Morley *et al.* (2019) assert that UBI has a high potential of eradicating poverty and improving living conditions. According to Maripally and Bridwell (2017:329), UBI has the potential of reducing poverty and starvation from 22% to 5%. Mays and Tomlinson (2019:3) indicate that the function of UBI is to restructure and reorganise the current social welfare system in order to promote progressive and democratic social cohesion and once UBI is implemented, individuals below the poverty line and low-income earners will be able to afford essential necessities. In this regard, individuals from a disadvantaged background will be less vulnerable to bureaucratic abuse of the current targeted social system (Zhen *et al*, 2017). Berman 2018; Haagh, 2019).

Individuals and organisations which are opposing the implementation of UBI are concerned about the financial burden that the government bears when providing to the nation as a whole (Eskelinen & Perkiö, 2018). Furthermore, the question remains unclear as to how governments will raise funds for basic income. Gilbert *et al.* (2018), assert that UBI will contribute negatively towards the labour market as the beneficiaries might become complacent and unwilling to work. Lastly, the money distributed to the citizens by the government could result in an influx of migrants who wish to benefit from this UBI (Goldsmith, 2010:299). Therefore, this will increase the burden on the government as they are placed under pressure to make UBI available to everyone including individuals from other countries.

Switzerland is the first country in the world to reject UBI on the basis that it would negatively affect service delivery and consequently result in an increase in income tax. The implementation of UBI was rejected even though the advocates for UBI in Switzerland indicated that UBI will address income insecurity due to a lack of job opportunities and massive job losses as a result of the implementation of robots with artificial intelligence (Von Elm, 2017). On the other hand, Straubhaar (2017:80) indicates that; the fast-growing population, the lack of job opportunities, and the replacement of human labour force with

artificial intelligence will put pressure on the income tax system to fund UBI as robots do not pay tax. Therefore, the sustainability of UBI in the long run is unclear.

Although there is evidence that UBI is seemingly a good welfare system that will potentially transform society and restore human dignity, it could, at the same time, amount to dire consequences if the implementation is not broadly assessed. All factors need to be looked into before concluding on whether to go ahead with the implementation or not.

1.5.2. Comparison of targeted basic income and UBI

The difference between the UBI and Targeted Basic Income (TBI) is that UBI will be provided to everyone without any means, tests or any conditions; while TBI is provided to specific people provided that the relevant conditions are met (Hoynes & Rothstein, 2019:929-958). The current social welfare system as an example of a TBI is designed for people to return to the workforce as there is no freedom to choose between working and staying at home (Zhen et al, 2017). UBI gives individuals freedom to choose between working and staying home and looking after their children (Rankin, 2019:28). TBI intensifies poverty as not everyone can meet the inclusion criteria, therefore low-income earners will by default not qualify for the social welfare. TBI does not favour everyone as it only caters for pensioners and children below the age of 18 (Morley *et al.*, 2019:11). The benefits of having UBI is that there are no exclusions criteria, as everyone is included (Rankin, 2019:28). TBI does not address all the needs required by individuals; hence, the advocates of UBI are of the view that TBI should be replaced with UBI to address all the concerns raised by society in general (Zhen et al, 2017). Piachaud (2018) strongly argues that not all the problems ingrained in TBI could be resolved by giving everyone money for free. Zon (2016) believes that the root causes of poverty and the lack of job opportunities needs to be thoroughly established instead of opting for the easy way out of giving people money for free.

1.5.3. The cost and funding model associated with the implementation of UBI

Hamilton and Mulvale (2019) argue that the non-availability of adequate resources to fund UBI creates a stumbling block for the implementation of UBI. In contrast, Zhen *et al,* (2017) and Freedman (2016) indicate that, with the rapid change of technology worldwide

and the introduction of robots with artificial intelligence putting pressure on the human labour force and income security, China is now embarking on a plan to implement UBI with an estimated cost of ¥3,742 trillion per year (R662 399 359 842), whilst on the other hand, 78% of the voters in Switzerland rejected the implementation of UBI citing it will cost the economy and taxpayers more money (Vol Elm, 2017). Banerjee *et al.* (2019) and Gan (2019) note that although there are many proposals on how these funds could be raised to ensure implementation of UBI, it could notably be proven that UBI is the best solution to resolve many social concerns. However, universally, it is not the best policy as the implementation depends of the level of economic growth of each country and the size of the populations.

De Wispelaere and Stirton (2012) are of the opinion that UBI can be implemented through an increase in progressive income tax, introduction of wealth tax and increase the rate of transactional tax (Value Added Tax). Furthermore, the government should consider reducing fruitless and wasteful expenditure and rather consider running the fiscal budget on a deficit. However, Calitz (2019) is of the view that tax administrators are unable to collect revenue charged in full as a result of tax evasion and impermissible tax avoidance, therefore even though there could be tax increments, the possibility of tax collection is minimal. A proper tax system and effective tax policy should be considered to manage the increment in tax changes to ensure that the implementation of UBI is successful (De Wispelaere & Stirton, 2012). On the other hand, increases in taxes could discourage workers, therefore a proper tax system should be put in place to benefit all the stakeholders (Eskelinen & Perkiö, 2018:696).

1.5.4. Poverty and inequalities

UBI has been undertaken or considered in most countries to address inequality, social injustice, poverty, and labour insecurity due to automation (Kneebone & Wilkins, 2019). Rallo (2019) declares that tackling social welfare problems by giving people money for free without any means test is an easy solution to resolve the current dilemma of poverty and inequality among people. Piachaud (2018) on the other hand argues that UBI is only a temporary solution to resolve the underlying problem of poverty in many black communities. McCartan *et al.* (2018) highlight the importance of establishing the root causes of poverty and further indicate that a lack of education and job opportunities are

the main contributing factors of poverty and in addition to this, people may be too lazy and not willing to work. UBI could be implemented but it could still be found that the *status quo* remains the same and the objective to address poverty and inequalities has not been resolved.

However, although a fixed amount will be given to everyone, it does not entirely result in resolving each individuals problem, as the extent of poverty has not been established (McCartan *et al.*, 2018:193). There is a high possibility that UBI might leave some people worse off than they were before. Although UBI is meant to address inequalities, by giving money to everyone irrespective of whether they work or not, UBI will not be solving the current social injustices, but rather perpetuating inequalities between the rich and the poor (McCartan *et al.,* 2018:193).

1.5.5. Capitalism

Most of the empirical and theoretical studies on UBI focused on the weaknesses and strengths as mentioned above, however few studies have considered the root cause of the high rate of unemployment, inequality, and poverty, more especially among the black community. It appears that the strategy of the state is to try and cover its market failure by giving people money for free without addressing the root cause (McCartan *et al.*, 2018:193). Davis (2017) and Manduca (2018) state that capitalism is the root cause of inequality and poverty, because the distribution of the resources are not equitable and only a handful of people own and control the resources in countries such as South Africa. Therefore, the equal distribution of wealth could be a panacea to social injustice, inequality, and the unemployment rate (Davis, 2017).

1.5.6. Loopholes in the piloting programme

Banerjee *et al.* (2019) claim that the process and methodology followed during UBI were flawed and does not represent the purpose and objective of UBI. The UBI pilot project in Kenya covered 11% of the population and the project ran for 12 years while in some villages it only lasted for two years. The piloting programmes were mostly conducted by private institutions and targeting mostly individuals from poor background (Hanna & Olken 2018:202) In Finland critics argued that the UBI amount was too little, the project only run

for two years and it was discontinued due to limited funds. Banerjee *et al.* (2019) further indicate that these experiments only target participants from a poor background and those that are vulnerable while UBI is meant to target everyone and the transfer amount is meant to be sufficient to cover all necessities. All of these loopholes could be the result of political leaders being reluctant to implement UBI.

1.5.7. Conclusion

Based on the constructs identified from the systematised literature review, it's clear that the benefits of UBI are substantial and can change the lives of individuals from a poor background. However, the disadvantages that come with UBI cannot be overlooked as they could have a great impact on the implementation and sustainability of UBI in the future. As highlighted by McCartan *et al.* (2018) there should be concrete evidence for implementing a UBI for effective redirecting of the limited resources, considering that UBI should not target specific individuals but should cater for each citizen. As evidenced by the critics of UBI, the funding of UBI could be costly considering the current uncertain economic environment.

Zhen *et al,* (2017) in support of UBI, indicate that the implementation of UBI needs to be introduced gradually and the current targeted social welfare programme does not need to be dismantled, but should run concurrently with the UBI. According to McCartan *et al.* (2018:193), even though the programme is universal it does not mean that everyone should receive the same amount of money. The extent of poverty needs to be investigated as a single UBI amount might not resolve all the social challenges experienced with the current social welfare system. In conclusion, many factors need to be taken into account before deciding to implement a UBI.

1.6. STRUCTURE OF THE MINI-DISSERTATION

The structure of the mini-dissertation is divided into four chapters as summarised below.

1.6.1. Chapter 1: Introduction

This chapter gives the background of the research topic, clarifies the rationale and purpose of this study and explains the main research objective and supporting research questions. Thus, Chapter 1 presents an overview of the structure of the mini-dissertation.

1.6.2. Chapter 2: Research design and methodology

This chapter gives a detailed description of the research design and methodology used in this research study. The chapter commences with an orientation of the research design, explains the research methodology adopted, and clarifies the data collection process and results.

1.6.3. Chapter 3: Data analysis and presentation of results

Three databases were used to search for academic journals covering the 11 year period up to the year 2020. Keywords associated with non-implementation of UBI by political leaders despite its positive outcomes were used to identify relevant literature from the database. The academic journals extracted from the database were scrutinised to ensure the title and content are relevant to the research objective and the research questions. The inclusion- and exclusion criteria were used, the academic journals are peer reviewed journals and the language used was English.
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1.6.4. Chapter 4: Conclusion

This chapter provides a summary of the findings identified from this study as well as a recommendation in terms of the way forward. Due to some limitations which occurred in the study, suggestions are given for future research in areas the study did not cover.

CHAPTER 2:

RESEARCH DESIGN AND METHODOLOGY

2.1. INTRODUCTION

The main objective of this study is to investigate the reason why political leaders do not implement UBI despite its positive outcomes. The previous chapter illustrated the purpose of this study including the rationale and contribution to the body of knowledge. In this chapter, the focus is on the research designs and the research methodologies driving this study. This chapter begins by explaining the research design, followed by the elements of research methodology where the philosophical stance, the nature of the study, and the type of data will be discussed in detail.

2.2 RESEARCH DESIGN

A research design outlines a systematic framework on how the data is going to be collected and analysed in order to answer the research objective (Bertram & Christiansen, 2014:40).

Maxwell (2008:253) indicated that the research design serves as a blueprint of the research project as it ties the design, the nature of the study, methods of reasoning, data collection and analysis of the activities together to the research question to ensure the process of the research agenda is addressed (Maxwell, 2008:253).

2.2.1 Philosophical stance of the study

Philosophy is described as a way which human beings think and how they view and interpret certain concepts (Mingers, 2004:87). Previous experiences, beliefs, and observations influence some individual's thinking style and their perception of the world and situations (Mingers, 2004:87). A piece of new knowledge is developed and improved through an inquisitive attitude of mind. The mind questions and interrogates the facts and weighs it up against one another in the creation of new knowledge (Mingers, 2004:87).

There are four broad categories of philosophical perspectives:
- Positivism: this philosophical viewpoint proclaims that real events can be observed and experimented and be explained in a logical sense (Clarke, 2009:36).
- Realism: this philosophical viewpoint proclaims that the structure of reality influences the condition of knowledge in the mind, in other words the knowledge does not automatically mushroom from the mind, but rather from what is happening externally which has an impact on an individuals' perception. Although such knowledge is not universal, but rather subjective (Miller & Tsang, 2011:139).
- Interpretivism: this philosophical stance aims at producing an understanding of the context of a certain concept through interrogating the available information (Clarke, 2009:36).
- Pragmatism: this philosophical stance refers to ways of thinking or handling challenges logically and practically without relying on theory, thus common sense is applied (Morgan, 2014:1046).

This study falls within the ambit of an interpretivism philosophical stance, as it focuses on gaining an understanding on the reason why political leaders are reluctant to implement UBI.

2.2.2. The nature of the study

The nature of the research can be divided into two groups, namely:

- Descriptive research method: deals with the description of the state of affairs as it is at a specific point in time and the benefits are that a problem can be solved through thorough observation, analysis of patterns and description (Gurevich, 2005:221).

- Analytical research method: under this research method, facts of information already available are analysed and evaluated to predict the future material (Gurevich, 2005:221).

This study will follow a descriptive research method to investigate the reason why political leaders do not implement UBI, despite its positive outcomes. The focus will be on a qualitative research design and secondary data will be evaluated in order to answer the research objective.

2.2.3. Reasoning methods

There are three main reasoning methods related to research studies, namely:

- Deductive: is a theory-testing process which commences with an established theory or generalisation, and seeks to see if the theory applies to specific instances (Hyde, 2000).

- Inductive: reasoning methods that are dealing with probability and reason by consistency and look for a pattern in data (Hyde, 2000).

- Abductive: a systematised creativity or an intuition (deals with making judgemental inferences) and reason by analogy, comparing an interesting observation in research to develop new knowledge (Van Hoek, Aronsson, Kovács & Spens, 2005). Abductive reasoning methods aim at bridging the gap between deductive and inductive reasoning methods by bringing an element of creativity to the research rather than proving theories (Hoek *et al.*, 2005).

In this study an inductive reasoning method will be followed as the research seeks to answer the research objective's by investigating the reason why political leaders do not implement UBI despite its positive outcomes. Themes or constructs will be identified from the selected academic journals in order to establish a pattern in data so as to determine the reason for political leaders not to implement UBI.

2.2.4. Time horizon of the study

In terms of time horizon, the research design can either be cross-sectional or longitudinal:

* Cross-sectional studies: provides a snapshot of the outcome and the characteristics associated with data gathered at a specific point in time to answer a research question (Levin, 2006:24). For example, one particular sample can be drawn from the population and be studied at a particular specific time as in a single cross-sectional study (Levin, 2006:24).

* Longitudinal: A phenomenon is studied at more than one point in time to answer the research question. The data is gathered at two different points in time (Levin, 2006:24).

In order to accomplish the research objectives of this study and find answers to the research question, a cross-sectional time horizon will be used to analyse the data at a specific point in time, focusing only on data from the previous 16 years ranging from the period 2004 to 2008 (5 years) and 2010 to 2020 (11 years).

2.2.5. Unit of analysis

The unit of analysis is the level at which data is used to represent one data point in the analysis and refers to who and what is being analysed in this study (Silverman & Solmon, 1998:270).

Depending on the type of data used in the study, different techniques can be used to analyse data such as a correlation and regression analysis, one-way ANOVA, T-test, elaborated tables, diagrams or a SPSS system in a qualitative study (Silverman & Solmon, 1998:270).

The research topic can be used as a base to identify the unit of analysis. This study has one unit of analysis which is to investigate the reluctance of political leaders to implement UBI. Political leaders and the non-implementation of UBI serve as a focal point of this study. The selected academic articles will be used to answer the research question. Once the unit of analysis is identified, it allows for the collection and analysis of the academic journals which are relevant to the study to be easier.

2.2.6. Types of data

Studies can use either quantitative data, qualitative data or the mixed method approach as discussed below:

- Qualitative data refers to data that is not numerical in nature and is gathered from sources such as documents, observations, responses to questionnaires and information from interviews. (Crabtree & Miller, 1992).

- Quantitative data are number-based and statistical tests are used for the analysis of data and the findings are more general in nature. Qualitative methods start by defining variables in advance and then quantifying the observation of those variables (Crabtree & Miller, 1992).

- Mixed methods refers to the use of both qualitative data and quantitative data as a combination in research (Creswell & Creswell 2017)

For this study, qualitative data will be used as existing literature will be reviewed to conclude on reasons for the non-implementation of UBI by political leaders.

2.2.7. Sources of data

There are two sources of data, namely primary and secondary data:

- Primary data is data that is collected by the researcher from first hand sources and using methods such as interviews, surveys and experiments to obtain the data (Hox & Boeige, 2005).

- Secondary data is data that has been collected from already existing sources and which is readily available such as books and published journal articles (Hox & Boeige, 2005).

This study is using a qualitative research approach and as a result, data collected from existing sources (secondary data) will be used in this study.

2.3. RESEARCH METHODOLOGY

This section clarifies the research methodology adopted in the study in terms of its methodological classification, research strategy, data collection technique, the quality

assessment of the data, and the sample of academic articles selected for analysis in terms of the research objectives of this study.

2.3.1. Methodological classification

There are three main methodological classifications, namely qualitative research, quantitative research, and mixed-method research. Qualitative research is about understanding human behaviour and the aspects of social life, including attitudes and experiences (McCusker & Gunaydin, 2015). Furthermore, Queirós, Faria and Almeida (2017) strongly agree that qualitative research is about obtaining a deeper understanding of the social problem at hand rather than being concerned with a numerical representative. Quantitative research is about numbers and statistics (McCusker & Gunaydin, 2015). The main purpose of quantitative research is to answer the 'how much' and 'how many' questions while qualitative research is more about generating words with the main aim of answering the research question of what, how, and why (McCusker & Gunaydin, 2015).

When using the qualitative research method, the personality of the researcher plays a major role as there could be some elements of emotional attachment and bias on the researchers' part which could influence the final results and lead to an incorrect conclusion (McCusker & Gunaydin, 2015). Bengtsson (2016:9) agrees that in order to minimise the researcher's bias an understanding of the topic during the planning phase and the final stage when data is being analysed must be observed to ensure the researchers' personality does not influence the outcome of the study. The quality of the research process is crucial to ensure the data collected is correctly interpreted (McCusker & Gunaydin, 2015). In contrast, with quantitative research, the quality of the raw data is important and there is minimal emotional attachment and bias from the researcher. McCusker and Gunaydin (2015) also claim that quantitative research is one of the most preferred methods, the reason being statistics can deliver more valid data and ascertain present and future trends.

In quantitative research, data and information can be interpreted objectively without the influence of the participants. The benefits of this type of research method is that the process of quantifying can be repeated using the same methods or formulas and the

findings can be valid and be generalised to the rest of the population while in qualitative research the finding cannot be generalised (McCusker & Gunaydin, 2015).

The mixed-method research is when both the qualitative research and the qualitative research are used simultaneously and the mixed methods are applied mostly on more complex research (McCusker & Gunaydin, 2015). Tashakkori, Teddlie and Teddlie (1998) agree that mixed-method research is an integration of qualitative- and quantitative research into a research methodology of a single study. Furthermore, Tashakkori *et al.* (1998) state that there are various types of mixed-method studies. Firstly, sequential studies, where the research phases are performed separately starting with one method and followed by another and the final results are compared at the end. The second mixed method is a parallel method where both qualitative- and quantitative research methods are performed simultaneously. The third type of a mixed method is an equivalent status design where both methods are used equally so as to understand phenomena.

In this study a qualitative research method will be used because the overreaching objective of this study is to investigate the reluctance of political leaders to implement UBI. Therefore, secondary data will be used to gain an understanding of this social problem and find answers to this research problem.

2.3.2. Systematised review of the literature

A systematic review is a literature review using a rigorous and documented search strategy. The rigorous process which is followed will assist in identifying the knowledge gap in the literature and highlight methodological inconsistencies and weaknesses and then create an opportunity for future research (Mallet *et al.*, 2012:445-455). The selection process under systematic review synthesises all evidence that fits predetermined criteria to answer a specific scientific question (Mallett *et al.*, 2012:455-455). The systematic review approach is adopted to obtain and analyse relevant literature for the study. The systematic approach entailed documenting the steps followed to obtain literature relevant to the study using databases and information sources to identify and record the literature as well as applying inclusion- and exclusion criteria (Mallett *et al.*, 2012:445-455).

A systematic literature review follows a more in-depth and well-structured research approach to review and synthesise literature relevant to a specific research topic (Cronin,

Ryan & Coughlan, 2008:38-43). With a systematic literature review the focus is not only on the findings, but the design, data and analytical methods are also taken into consideration.

The current traditional methods of reviewing literature allow some literature to be cited frequently while other studies are being overlooked, therefore researchers using a systematic review are able to review various literature without being bias which will assist in generating clearer and more objective answers to the research questions (Mallett *et al.*, 2012:537).

Apart from the benefits mentioned above, a systematic literature review could also have its challenges. Firstly, this type of research study could be time-consuming as the review of relevant literature requires access to a wide range of databases and peer-reviewed journals. Secondly, not all journal articles obtained from the databases could be relevant as the inclusion- and exclusion criteria used to screen relevant literature may have been applied inconsistently (Mallett *et al.*, 2012:537). Thirdly, even though there are a wide range of databases, it can be found that the journals available fall beyond the scope of peer reviewed journals which will amount to limited journals from which to draw conclusion on the study. Moreover, if the peer reviewed journals are not published in lists such as the ABDC journal ranking list (Mallett *et al.*, 2012:537).

Lastly, when using a systematic literature review the inclusion- and exclusion criteria requires a high level of attention to detail to ensure each article is thoroughly screened and assessed in order to determine which academic articles are relevant to the study. Sometimes the inconsistencies in how each peer reviewed journal is written, such as unstructured titles, abstracts, research design and findings, make it more challenging to assess the relevance of the data and as a result important material might be missed (Mallett *et al.*, 2012:537). Khallaf, Naderpajouhand and Hastak (2017) conclude that a systematic literature review is suitable in situations where a research gap in literature has been identified and moreover, for summarising data for a research topic.

2.3.3. Data collection technique

The purpose of this study is to investigate the reluctance of political leaders in implementing UBI despite its positive outcomes. The section below will indicate how the data is going to be collected and which database will be used to extract relevant literature

which enables the stated research questions to be answered and to accomplish the research objectives. Adding to this, it includes the process of selecting and recording relevant academic articles. This technique follows structured logical steps, which are clarified in the following sections under the headings of keywords, search criteria, and the recording of data.

2.3.3.1. Keywords

To retrieve relevant articles from a wide range of databases, various keywords have been established based on the research topic, research question as well as the research objectives, which will enable the researcher to extract journals or articles which will assist in getting answers to the research question. Table 2 below reflects the keywords used.

Table 2: Keywords

Initial Topic	Similar Terms	Broader Terms	Narrower Terms
Universal Basic Income	Basic Income guaranteed Basic living stipend Guaranteed minimum income	Transfer Dividends	Basic Income

2.3.3.2. Search criteria

The following criteria will be considered in determining which articles must be included and which ones to be excluded, including search criteria for identifying, selecting and recording of academic articles:

- This review only considered articles published in academic journals and therefore, excluded textbooks, specialised books, dictionaries, Web and other publications by professional entities/bodies, government institutions, international institutions and grey literature, referring to reports by entities, theses and dissertations, conference papers, popular media, and work-in-progress unpublished papers.
- This review is not limited to any country-specific academic articles. This review considers all articles, irrespective of the research design or methodology. Only publications in English are included in this review and only articles published for the periods ranging from 2004 to 2008 (5 years) and 2010 to 2020 (11 years) were

considered in this review. This review is limited to published academic literature available in electronic format through the University of Pretoria's Library, which includes Google Scholar, EBSCOhost, Emerald and ProQuest.

2.3.3.3. Recording of selected academic articles

One of the disadvantages of using a systematic literature review is that it is time-consuming. However, in this study, Qiqqa software will be used to record and organise all the academic articles extracted from the various databases. All the articles extracted from the various databases will be tagged with similar or relevant keywords. This software will be used to map various articles in order to establish the various patterns and critically evaluate the articles generated from the database. Lastly, Qiqqa will be used to record the articles and to assess the quality of the recorded articles making use of the Australian Business Dean Council list (ABDC, 2019).

2.3.4. Quality assessment of the data

The Australian Business Deans Council (ABDC) publishes a list of journals which are ranked into four categories, namely A*; A; B; and C with A* considered to be the best in quality. A number of metrics such as the citation rates, impact factor and peer judgement are considered by a panel of experts in ranking the various journals into the four categories. The above mentioned four categories are defined in ABDC (2019) as follows:

- A* rated: These journals are defined as being 'the best or leading journal in its field - publishes outstanding, original, and rigorous research that will shape the field';
- A-rated: This is the second-highest quality category;
- B rated: This is the third quality category; and
- C rated: This is the fourth quality category.

The results from the quality assessment are summarised and presented in Table 3 below.

Table 3: Quality assessment results

Name of the Journal	A* Rated	A Rated	B Rated	C Rated	Not Rated	Total Number
Accounting and Business		√				1

Name of the Journal	A* Rated	A Rated	B Rated	C Rated	Not Rated	Total Number
Research						
American International Journal of Contemporary Research					√	1
American Society for Competitiveness					√	1
Annual Review of Economics			√√			2
Annual Review of Political Science					√	1
Basic Income Studies				√√√√√√√√√		9
Brazilian Journal of Political Economy					√	1
Canadian Public Policy			√			1
Development policy review			√			1
Dissent					√	1
Global Economic Observe					√	1
Globalizations					√	1
In Competition Forum					√	1
Independent Review				√√		2
Intereconomics					√	1
International Social Security Review					√	1
Journal of Development Effectiveness				√		1
Journal of Economic Perspectives				√		1
Journal of Poverty					√	1
Journal of Poverty and Social Justice					√√	2
Maytree Foundation					√	1
New Delhi					√	1
New Political Science					√	1
Public Policy Publications					√	1
Rutgers Journal of law and urban policy					√	1
Social Alternatives					√√√	3
Social Inclusion					√	1
Social Policy and Society					√	1
Social Sciences					√	1
Social Work					√	1
Sociological Science					√	1

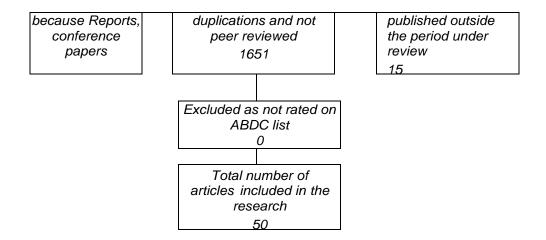| Name of the Journal	A* Rated	A Rated	B Rated	C Rated	Not Rated	Total Number
Technology Review					√	1
Tech. rep.UNDP					√	1
The Journal of Developing Areas					√√	1
World Development		√√				2
Total	**0**	**3**	**4**	**13**	**30**	**50**

2.3.5. Summarised overview of data collected and quality assessment

The following keywords; universal basic income and guaranteed basic income were used to extract articles from the three most recommended databases which are Emerald, EBSCOhost and ProQuest. In total, 2 605 articles were identified and screened with the inclusion- and exclusion criteria applied in order to identify relevant articles in order to respond to the research question. The majority of the articles identified are theoretical studies and few were for empirical studies. The following criteria was used to screen the academic journals, namely the year it was published and only those that were published in the period ranging 2004 to 2008 (5 years) and the period ranging from 2010 to 2020 (11 years); peer reviewed journals; and English versions only. Thereafter, the topic of each article and the abstract were screened to ensure only relevant articles are included.

The 50 articles identified met the inclusion criteria of which 20 ranked on the ABDC list and the remaining 35 did not meet the ABDC quality assessment. However, the 30 articles which did not meet the ABDC quality assessment were not excluded from this literature review as the articles were relevant for the study as some were cited many times. Figure 1 below, presents a summary of the quality assessment.

Figure 1: Quality assessment: Summary of results

because Reports, conference papers	duplications and not peer reviewed 1651	published outside the period under review 15

Excluded as not rated on ABDC list 0

Total number of articles included in the research 50

2.4. CONCLUSION

This study will follow a qualitative research design and a systematic literature review approach to establish reasons why political leaders have not implemented UBI. Qiqqa will be used to organise and arrange the relevant literature in order to accomplish the research objectives including finding answers to the research questions. Various databases such as EBSCOhost and ProQuest will be used to source academic articles. These databases will enable the section on quality and relevant data for this study and aiming at articles that are published in ABDC journal listing.

CHAPTER 3:
DATA ANALYSIS AND RESULTS

3.1. INTRODUCTION

The previous chapter explained the research design and methodology, including the process followed to select the academic journals relevant for this study. In this chapter the focus is on clarifying the data analysis technique to be applied. The data extracted from the selected academic journals will be organised logically and consistently into categories and subcategories, thereby creating a taxonomy framework (Huitt, 2004). The structure of this chapter consists of four parts; firstly the introduction which gives an overview of this chapter, secondly the data analysis technique, which provides the methods and techniques that will be used to analyse the data selected for this study, thirdly the presentation of results and discussion, which explain the results and findings of the data analysed, and lastly the conclusion.

3.2. DATA-ANALYSIS TECHNIQUE

Data analysis refers to the process a researcher applies to synthesise and interpret a large volume of raw data in order to make sense of it (LeCompe & Schensul, 1999). The data analysis technique that will be adopted in this study, will provide a level of understanding, explanation and interpretation of the secondary data. There are several types of techniques or methods which can be used to analyse data under a qualitative research method, the following techniques were reviewed and considered:

- Content analysis: is used to determine the frequency of words or patterns (Bernard, 2013).
- Descriptive analysis: is used to describe the basic features of the data in the study (Best & Kahn, 2003).
- Correlation analysis: aims to identify the relationship between two variables through statistical evaluation (Vithal & Jansen, 2012).
- Regression analysis: is a statistical tool used to investigate and analyse the functional relationship amongst variables (Chatterjee & Hadi, 2015).

- Grounded theory analysis: under this technique data is analysed with the main objective being to generate theory out of the research data (Bernard, 2013).

- Thematic Analysis: is the analysis of qualitative data for the with main purpose to extract key themes based on the agreed principles of defining core themes in data (Vithal & Jansen, 2012).

The thematic analysis technique will be used for the purpose of this study as the data from the selected academic journals will be identified and organised systematically into patterns or themes. Furthermore, the thematic analysis technique can be used as a tool to identify common or repetitive information amongst the data collected, in order to enable the researcher to interpret, understand and make sense of the themes or patterns (Vithal & Jansen, 2012).

3.3. PRESENTATION OF RESULTS AND DISCUSSION

In order to effectively and efficiently understand and make sense of the data extracted from the 50 academic articles, the data was organised logically and consistently into six categories, namely Authors; Academic Journals; Academic Discipline; Perspective; Theoretical Framework; and Research Design and Methodology while others categories are being divided further into subcategories. The outcomes of the stated categories are presented and discussed in detail in the following section.

3.3.1. Authors

Leimu and Koricheva (2005) asserted that the quality of the articles is normally assessed based on the authorship a paper that has multiple authors is deemed to be of a higher quality than those written by one individual. Moreover, papers which have multiple authors results in an increase in the number of citations. Furthermore, the qualifications and the experience of the authors add substantial value towards the quality of the paper. Table 4 on the following page, presents the list of the authors who made contributions on the selected academic journals, followed by a discussion of the analysis and interpretation of the results.

Table 4: Authors

Authors	No Articles
Banerjee, A. Niehaus, P. & Suri, T.	1
Bashur, D.	1
Battistoni, A.	1
Berman, M.	1
Bidadanure, J.U.	1
Bonciu, F.	1
Calitz, E.	1
Davis, C.A.	1
De Wispelaere, J. & Stirton, L.	2
Eskelinen, T. & Perkiö, J.	1
FitzRoy, F. & Jin, J.	1
Freedman, D.H.	1
Gilbert, R., Murphy, N.A., Stepka, A., Barrett, M. & Worku, D.	1
Goldsmith, O.S.	1
Gross, R.	1
Haagh, L.	1
Hamilton, L. & Martin-West, S.	1
Hamilton, L. & Mulvale, J.P.	1
Hoynes, H. & Rothstein. J.	1
Kneebone, R.D. & Wilkins, M.	1
Koslowski, A. & Duvander, A-Z.	1
Lee, S.	1
Manduca, R.	1
Marais, H.	1
Maripally, A. & Bridwell, L.	1
Martin, J.	1
Mays, J. & Tomlinson, J.	1
McCartan, C., Morrison, A., Bunting, L., Davidson, G. & McIlroy, J.	1
Mencinger, J.	1

Authors	No Articles
Morley, C., Ablett, P. & Mays, J.	1
Mitchell, W. & Watts, M.	1
Murray, C.	1
Oats, L. & Tuck, P.	1
Piachaud, D.	1
Rallo, J.R.	1
Rankin, K.	1
Ravallion, M.	1
Sculos, B.W.	1
Špeciánová, J.	1
Stevens, H. & Simpson, W.	3
Straubhaar, T.	1
Vlandas, T.	1
Von Elm, E.	1
Whaples, R.	1
Yusuf, M., Malarvizhi, C.A., Mazumder, M.N.H. & Su, Z.	1
Zhen, Y., Guerriero, M., Lopez, E.V. & Haverman, P.	1
Zon, N.	1
Total	**50**

The first column in Table 4 lists the names of authors who wrote the fifty selected academic journals for this study. The second column reflects the number of articles written by the respective authors which were selected for this study. Of the 50 academic journals selected, 24 articles (48%) were written by individuals, while 26 (52%) of the articles were multi-authored. Leimu and Koricheva (2005:28-32) indicate that when researchers collaborate with other authors it is an indication of a high-quality journal article because in most cases the authors are from different disciplines and provide a large pool of ideas with these collaborations saving time and cost. According to Leimu and Koricheva (2005), collaboration with other authors eliminates the bias in the paper because the study is well rounded and in depth. The argument in the study is, therefore, strengthened and more appealing to be cited by other authors (Leimu & Koricheva, 2005:28-32).

As 26 (52%) of the academic journals selected for the purpose of this are multi authored, this could be an indication that the data used in this study is well rounded and of good quality as it consists of authors from various disciplines Therefore, this could indicate that collaborating with other authors could add value to the quality of the study. As there are authors linked to more than one article, as shown in the second column in Table 4, it shows that UBI has been researched more than once by the same authors. In total six (12%) out of the fifty selected academic journals were written by the same authors and in each academic journal, the authors researched UBI from a different perspective. For example, Stevens and Simpson (2017) performed a research regarding the unrealised promised of UBI in Ontario while in 2018 they conducted further research looking at whether Canadians are ready to reduce poverty through UBI. This is evidence that the same authors investigated and assessed the advantages and disadvantages of UBI with regards to various countries and perspectives through utilising their expertise and prior experiences.

3.3.2. Academic journals

This section presents the results related to the journals in which the selected academic articles were published and the disciplines from which the articles were published.
.
3.3.2.1. Journals

A high-quality journal creates a greater impact, better visibility and consequently the authenticity of the data can be trusted by the users (Weale, Bailey & Lear 2004:14). Table 5 below provides an overview of the journals in which the selected articles were published in order to determine the coverage and the dissemination of UBI.

Table 5: Academic journals

Name of the Journal	No of Articles
Accounting and Business Research	1
American International Journal of Contemporary Research	1
American Society for Competitiveness	1
Annual Review of Economics	2
Annual Review of Political Science	1
Basic Income Studies	9

Name of the Journal	No of Articles
Brazilian Journal of Political Economy	1
Canadian Public Policy	1
Development policy review	1
Dissent	1
Global Economic Observe	1
Globalizations	1
In Competition Forum	1
Independent Review	2
Intereconomics	1
International Social Security Review	1
The Journal of Developing Areas	1
Journal of Development Effectiveness	1
Journal of Economic Perspectives	1
Journal of Poverty	1
Journal of Poverty and Social Justice	2
Maytree Foundation	1
New Delhi.	1
New political science	1
Rutgers Journal of law and urban policy	1
Social Alternatives	3
Social Inclusion	1
Social Policy and Society	1
Social Sciences	1
Social Work	1
Sociological Science	1
Technology Review	1
Public Policy Publications	1
The Journal of Developing Areas	1
World Development	2
Total	50

Table 5 has two columns, the first column lists the names of all the journals in which the 50 selected academic articles were published. The second column indicates the number of articles selected for this study. In total 20 (40%) of the 50 academic journals selected for this study are rated in the ABCD journal listing. With reference to Table 3 in Chapter 2, the 20 articles included in this study were rated as follows, A (3), B (4), C (13) and the remaining 30 articles (60%) where not rated on the ABCD journal listing, however, this does not impair the quality of the journals selected since they are peer reviewed and are cited by other authors.

The thirteen C rated academic journals published on the ABCD journals only nine articles were published on Basic Income Studies which amount to 69%, while three articles where published on Social Alternative Journal. Basic Income studies journal is more focused on discussing basic income, poverty and other social welfare and this serves as a good platform to elevate the discussion of UBI and moreover, to understand the reasons why political leaders have not made any implementation to date. The Basic Income Studies and Social Alternative Journal is also a platform to debate social and political issues. The remainder of the 50 academic journals selected, 34 (68%) journals, were published and spread across different journals and this indicates a keen interest in the topic of UBI by various authors. However, of the 50 academic journals selected, only one journal was published in Annual Review of Political Science which is a concern, since this could be a platform to ensure the message of implementing UBI is heard and reach out to relevant individuals who are capable of implementing UBI and redress the current economic crisis. In addition, one academic journal was also published in the technology review journal and this is evidence that the impact of loss of income security as a result of changes in technology, has not been researched as well as the potential of UBI serving as a solution to address income insecurity which could lead to poverty and hunger (Freedman, 2016).The purpose of this study is to investigate the reluctance of political leaders to implement UBI and this analysis is an indication that there is no in depth coverage of this topic in the political journal and this might defer the implementation of UBI by political parties.

3.3.2.1. *Scientific disciplines*

A discipline can be commonly defined as a subject taught. The definition can be expanded to include a body of accumulated expertise knowledge on a subject identified in an academic institution (Vithal & Jansen, 2012).

The discipline element showcased how much attention has been given to the subject of UBI. Table 6 below illustrates the disciplines from which the articles were published, followed by an explanation of these disciplines.

Table 6: Academic discipline

Discipline	Number of Academic Journals

Basic Income Guarantee and Politics	1
Economics	12
Economics and Business	2
History and Political Science	1
Human Resource	1
Psychology and Economics	1
Political Economy	2
Political Science	5
Politics	3
Public Policy	1
School of Law	1
Social Work and Sociology	1
Social and Political Science	1
Social Policy	1
Social Science	12
Social Science, Education and social work	1
Social science and economics	1
Social work	1
Social work and Ethics	2
Total	**50**

Table 6 has two columns, the first column reflects all the disciplines for the fifty articles obtained. The second column indicates the number of articles that were covered by the discipline. Out of the 50 articles obtained, 12 (24%) of the academic journals were published in the field of Economics as well as 12 (24%) in the field of Social Science. UBI is attempting to address the current economic and social crisis as a result of the high rate of unemployment, poverty and income security (Standing, 2008). With 11 (22%) of the articles published in the political field, this is an indication that UBI is gradually gaining momentum in this field. UBI drew attention from 18 different disciplines which is evidence that authors from different disciplines collaborate with each other to ensure an in-depth analysis of the study.

3.3.3. Perspectives

This section deals with the different perspectives from which the selected articles were researched. Specifically focusing on country, groups of countries and taxpayer's perspectives.

3.3.3.1. Country perspective

For the purposes of this study the country perspective is defined as the country which the study focused on. The country perspective highlighted the regions that have been covered during the research of UBI. Table 7 below illustrates the countries which the studies were based upon, and are explained thereafter.

Table 7: Country perspective

Country	Number Articles
16 European countries	1
18 OECD countries	1
21 European countries	1
Alaska	1
Alberta	1
Australia	3
Canada	5
China	1
Czech Republic	1
Denmark	1
England	1
Germany	1
India	1
India and Brazil	1
Namibia and India	1
New Zealand	2
South Africa	3
Sweden	1
Syria	1
United Kingdom	6
United States of America	16
Total	**50**

Table 7 has two columns, the first column reflects all the countries focused on based on the 50 selected articles. The second column indicates the number of articles which focused on the country mentioned in the first column. Based on the numbers reflected in Table 7, UBI has been written from the perspective of 22 countries represented in the 50 academic articles selected for this study. This provides evidence that UBI has gained more traction in different countries. The UBI was also written from a group of countries perspective as the studies were addressing the same challenges faced by each country in the group.

Of the 50 academic journals selected, 15 (30%) were written from a United States of America (USA) perspective and were mostly advocating for the implementation of UBI due to income security as a result of changes in technology and automation. Therefore, this provides evidence that UBI is receiving more attention from high income countries (Hoynes & Rothstein, 2019:930; Lee, 2018). Of the 50 academic articles selected, only four were written from an Africa perspective and this shows that minimal research was conducted in African countries. UBI experiments were performed among others, in Kenya and Namibia and to date no implementation has been done nor further experiments performed throughout the continent.

Poor governance, corruption and limited employment opportunities has left many individuals in African countries living below the poverty line and in poor conditions resulting in them not being able to afford basic necessities (Addae-Korankye, 2014).To date, the idea of implementing UBI has not been effected or considered in as many African countries compared to other regions such as Canada and the United Kingdom. Therefore, this study has highlighted the importance of having more research undertaken in African countries which could encourage the political leaders to see the importance and the potential benefit of UBI as a tool to reduce poverty.

3.3.3.2. Taxpayer perspective

For the purposes of this study, the taxpayer perspective was defined as the type of taxpayer the study focused on; the taxpayer being a person legally liable to pay tax. The taxpayer perspective indicated which taxpayers have been targeted in funding the UBI.

Table 8 below illustrates the taxpayer perspectives that were addressed in the literature on which the studies were based, and are explained thereafter.

Table 8: Taxpayer perspective

Taxpayers	Number of Academic Journal
Corporate tax and individual tax	4
Individuals	3
MNE corporate tax and Individuals	1
None	42
Total	**50**

Table 8 has two columns, the first column reflects the types of taxpayer the 50 academic journals selected focused on. The second column indicates the number of academic journals selected for this study and where the taxpayers listed in the first column, were discussed. One of the objectives of this study is to determine the efficient model of financing UBI. Table 4 on page 25 gives an overview on how UBI could be funded. Four of the 50 academic articles selected suggest that corporate and individual tax can be used to finance UBI, while only three articles indicate an increase in individual's tax can come as an aid to fund UBI, while 41 (82%) of the selected academic journals did not suggest how UBI is going to be funded. Unclear financing models of UBI could be an indication of why political leaders are reluctant to implement this proposal. This study has, therefore, identified a gap in current literature as only a few of the selected articles suggested a financing model for UBI.

3.3.4. Theoretical framework

Theoretical research framework serves as a structure which can guide or support a theory for a research project (Osanloo & Grant, 2016). This research framework plays a role in guiding the entire process of the research study (Osanloo & Grant, 2016). In this study, the theoretical framework includes the main constructs or themes under investigation, the types of taxpayers and variables.

3.3.4.1. Main constructs under investigation

A construct is defined as the main issue, fundamental theme or an idea being researched in the study (Vithal & Jansen, 2012). In order to have a better understanding of the research area which has been covered in relation to UBI, the constructs or themes in all 50 articles were considered. This gives an overview of the aspects of UBI which have already been extensively researched as well as those which have not been researched. Table 9 on the following page reflects the 11 constructs that were found as literature analysis, followed by a detailed explanation of these constructs.

Table 9: Constructs

Constructs	Number of Academic Journals
Funding model for UBI.	9
Factors influencing the implementation of UBI.	7
Factors affecting the implementation of UBI.	11
Economic uncertainty.	1
Poverty, Income Inequality and Capitalism	13
Incremental taxes.	1
Dissatisfaction in the existing social welfare system.	3
Job insecurity due to digitalisation and advance technology	2
Loopholes in the piloting program.	2
Gender Equality	1
Total	**50**

Table 9 has two columns, the first column reflects all the different constructs that were studied in the fifty articles obtained. The second column indicates the number of articles which studied the construct. The purpose of analysing the construct was to determine the extent in which UBI has been covered in previous literature. The analysis was done to avoid repetition of the issues that have been researched in the previous studies and to ensure this study contributes and adds value to the body of knowledge. The 11 constructs identified from reviewing the literature results were interpreted in order to find answers to the research objectives and questions for this study. The analysis of the constructs enabled the study to focus on the issues hindering the implementation of UBI:

- **Funding model for UBI**

In 15 (30%) of the 50 academic articles selected, a suitable model that could be adopted to fund UBI, was discussed. Finding a suitable model to finance UBI is one step closer towards the implementation of UBI by political leaders. Whaples (2015) suggests that UBI could be funded through introducing wealth tax, thereby taxing the rich more. The introduction of wealth tax could be another form of addressing inequalities amongst individuals by redistributing income from the rich to the poor (Battistoni, 2017; Bashur, 2019).

Amid the 2008 global financial crisis there was an increase in tax avoidance by many multi-national enterprises (MNE) across the globe and this has led to a call for MNEs to be transparent regarding their tax affairs and to ensure each enterprise pays their fair share of taxes (Oats & Tuck, 2019). The 2019 tax transparency report reveals that close to 36% of MNEs paid almost no tax even though they have generated excessive sums of revenue (Battistoni, 2017; Bashur, 2019). Governments rely heavily on tax as a source of revenue, therefore strengthening the tax administration will close the opportunity to evade tax and could assist the revenue authority to generate tax from untapped revenue and fund UBI (Eskelinen & Perkiö 2018).

However, UBI will not only cost the state considerable amounts of money for the pay-outs, additional funds will be needed to build a new banking infrastructure and to improve the existing infrastructure so as to accommodate the increase in the number of UBI beneficiaries being able to deposit and withdraw cash (Stevens & Simpson, 2017). In contrast, Stevens and Simpson (2017) suggest that additional tax such as wealth tax and an increase in corporate or individual tax will not be ideal to finance UBI, but governments should rather opt to self-finance themselves by making use of tax credit. The research objectives and questions for this study is to determine how much UBI will cost the government and what will be the most suitable model to fund UBI. Wealth tax, consumption tax, resource tax and negative income tax, including tax credit could be taken as the resource which the political leaders could consider to finance or fund UBI.

Although, in areas where UBI was piloted, in most cases non-profit organisations funded the experiments. In countries such as Kenya and Namibia the suggested form of tax to fund UBI was not tried and tested (Battistoni, 2017; Bashur, 2019). Therefore, there is no evidence that these types of taxes will be sufficient to fund UBI. If wealth tax

is opted as a means to fund UBI, this might discourage individuals to work hard and create more wealth resulting in opportunities to avoid paying tax or losing interest to invest in the country. This study has identified some gaps in the current literature where the suggested methods of funding UBI was not tested in anyway and created an opportunity for future researchers to test any of the methods and to determine whether it is sustainable.

- **Factors influencing the Implementation of UBI**
  The idea of UBI has recently gained popularity and in this study close to 50 academic journals were selected. This is evidence that the discussion surrounding UBI continues to gain momentum in various countries. Based on the numbers reflected in Table 9 on page 34, seven (14%) of the academic articles performed research on factors influencing the implementation of UBI. UBI is sought to resolve the current challenges faced by many countries, such as poor economic growth and a high rate of unemployment (Marais, 2020). Poor economic growth continues to have an impact on low income earners as they struggle to afford basic necessities even though they are employed. Furthermore, the labour market is currently threatened by automation and changes in technology. UBI could therefore, serve as a potential solution to the many socio-economic challenges (Zhen *et al,* 2017).

  Poor economic growth, high unemployment rate, poverty, as well as changes in technology threatening the labour market, have an enormous impact on the economic growth of many developing and undeveloped countries. FitzRoy and Jin (2018) concede that individuals will no longer earn a living by merely working due to digitalisation and robots taking over the labour market. Governments should consider adopting the policy to implement UBI in order to accommodate the forever evolving world so as to protect the income security which could lead to unemployment and poverty. UBI will, therefore, serve as a solution to address the current economic crisis, unemployment and income insecurity.

- **Factors affecting the implementation of UBI**
  Out of the 50 academic articles selected, 11 articles identified the factors affecting the implementation of UBI. De Wispelaere and Stirton (2012) suggest that a TBI will be a better option as it will be less expensive and more efficient since it will be specifically targeting individuals from a disadvantage background instead of making it available to

everyone. UBI should be paid on the basis of needs, thus targeting certain individuals. Rallo (2019) asserted that the reason many authors are advocating for the implementation of UBI is to try and resolve the social injustices, therefore, if this basic income is made available to all individuals it would not be resolving the problem and this approach will not be cost effective. Moreover, the current social injustices will not be resolved if UBI is made available for everyone. This will perpetuate the inequalities between the rich and the poor even further.

Hamilton and Mulvale (2019) point out that the grant received from a targeted social welfare system is insufficient to cover the basic necessities. Therefore, if political leaders could consider the implementation of UBI then this could uplift the individual's disadvantaged background and thereby, give them the freedom and dignity to live in a better environment.

Another factor affecting the implementation of UBI is the lack of reciprocity as there will not be a mutual benefit between the government and the individuals receiving the UBI (Sculos, 2019; Mencinger 2017). Marais (2020) is in agreement that individuals need to work first and contribute to the economy and not be entitled to UBI based solely on their citizenship. In contrast, to avoid stigmatising the recipients, Thomas Paine an American political activist, is of the view that UBI should be provided to individuals based on citizenship, as the main purpose of UBI is to resolve the social injustices and UBI should therefore, not be tied to charity or workhouse conditions (Davis, 2017).

- **Poverty, Income Inequality and Capitalism**
  Basic income is said to resolve the dilemma between fighting unemployment and combating poverty (Standing, 2008; Koslowski & Duvander, 2018). Although a fixed UBI amount would be given to each citizen, it does not entirely resolve unemployment as the extent of poverty needs to be established (McCartan *et al.*, 2018:193). However, even though UBI is deemed to eradicate poverty, there is a high possibility that some individuals will be left worse off due to the levels of inequality even among poor people. This study identified some gaps in the current literature and shows that basic income does not need to be a fixed universal amount but distributed on the basis of the extent of poverty. Only seven (14%) out of the 50 academic articles selected highlighted poverty, income inequality and capitalism. This is an indication that more research

needs to be conducted to get a better understanding of this phenomenon and its potential impact.

- **Dissatisfaction in the existing social welfare system**

Of the 50 academic articles selected, only three (6%) indicated dissatisfaction with the current social welfare system. The two main distinguishing features between UBI and the existing social welfare system are the facts that UBI is universal, meaning every citizen is entitled to receive the basic income unconditionally, while the existing social welfare system targets specific individuals and is also conditional (Rallo 2019). However, the existing social welfare systems have not accomplished the primary objective of lifting individuals out of poverty due to insufficient funds to cover basic goods and services. Those who are employed and are receiving a low income are also unable to benefit from the current social welfare system on the basis of not meeting the requirements (Hoynes & Rothstein, 2020).

Bidadanure (2019) indicates that UBI will not be able to resolve all the challenges that emanates from the current social welfare system. The introduction of UBI should not replace the current social welfare system, but reconstitute and strengthen the social (welfare) state and transform broader society (Straubhaar, 2017; Vlandas, 2019). Zon (2016) agrees that rather than creating a set of targeted programmes, the flexibility of an all-purpose UBI would allow it to respond to challenges faced by existing social welfare systems as UBI on its own will not be sufficient to resolve the loopholes identified in the existing targeted social welfare system. The idea of replacing all welfare programmes with UBI, as suggested by Murray (2016), would however, impose immense hardship on some of the poorest individuals. Therefore, this study has revealed that some of the social welfare systems do not need to be removed as they might offer much-needed support for the growing numbers in non-standard employment and a combination of the two systems can assist in alleviating poverty and resolving income insecurity.

Moreover, Rallo (2019) believes that the reason political leaders are not dismantling existing social grant systems is because during election campaigns many political leaders are able to gain support from the poor and low-income workers due to their vulnerability.

There are two categories of tax which a taxpayer is liable to pay, indirect and direct tax. For the purposes of this study, the types of tax are listed in Table 10 below, followed by a detailed explanation.

Table 10: Types of taxes

Taxpayers	Number of Academic Journals
Carbon tax, Pollution and Estate tax	1
Environmental tax and Consumption tax (VAT)	1
Property tax	1
Property tax and Natural Resource tax	2
Natural Resource tax	2
VAT and Excise duties	1
VAT and wealth tax	1
None	41
Total	**50**

Table 10 has two columns, the first column reflects the types of tax identified in the selected articles. The second column reflects the number of articles which focused on the types of tax mentioned in the first column.

In total, nine different types of tax namely Carbon tax, VAT, Estates, Environmental tax, property tax, Natural resource, Excise duties, Wealth tax, Pollution were identified from the 50 academic articles selected for this study, while the remaining 41 articles did not indicate the types of taxes that can be used as a source to fund UBI.

Based on the types of taxes listed in Table 10, VAT, Property tax and Natural resource appear to be the most suggested form of tax that can serve as a source to fund UBI, while a few suggested Wealth tax. This is evidence that most studies conducted research on UBI, however, these studies were not clear on how UBI is going to be funded. This study highlights that few studies recommend the types of tax which can be used to fund UBI and as a result, more research needs to be conducted to establish the effective and efficient types of taxes that can be used to fund UBI.

3.3.4.3. Variables

There are two types of variables, namely independent and dependent variables. Dependent variables are variables which depend on other factors that are measured. These variables are expected to change as a result of an experimental manipulation of the independent variable or variables. An independent variable is a variable that is stable and unaffected by the other variables (Mackey *& Gass 2015). Variables are used to translate the abstract or the constructs to the concrete measurable/testable. A variable, by definition, is something with its own attributes that can take on differing or varying values (Mackey *& Gass 2015). Table 11 on the following page illustrates the variables considered in the academic publications.

Table 11: Variables

Variables	No of Academic Journal
Basic Income, Gender Equality and Empowerment	2
Basic Income Guarantee, and Dividends	1
Basic income, Job Opportunity and Unemployment	2
Basic Income, Income Tax, and Equity Dividends	1
Basic Income, and Labour Supply	3
Financial investment, Credit market, Incremental taxes, and Growth of income	2
Cost of basic income, Poverty, Labour market, and Job markets	6
Government expenditure, Policy tool, and Existing welfare policy	1
Labour hours, Age, and Income maintenance Programmes	1
Labour supply and Basic income	1
Minimum income	1
Minimum income protection, Working individual, Poverty line, and Welfare income	4
Cash transfers and targeted poverty, Pilot programmes, and Labour hours	1
Population register, Variable payment and Policy tool	1
Poverty	5
Social assistance programmes and Pilot project Employment	3

Variables	No of Academic Journal
Tax credits, Populations, Transfer system, Labour supply	1
Tax distortions, Income tax, and Progressive consumption tax	1
Tax rates and Tax base	1
Unemployment rate, Labour hours, Share of income, Artificial Intelligence, and Wages	8
UBI	2
Transfer Programmes	1
Labour Supply	1
Total	**50**

Based on Table 11, eight (16%) of the 50 academic articles selected identified variables which include labour hours, the unemployment rate and artificial intelligence. The impact of UBI on the labour hours is being investigated and how UBI is going to be resolved (Gilbert *et al.*, 2018). The impact of artificial intelligence on the labour market and the unemployment rate is being analysed. Poverty is also a phenomenon which is being investigated in order to establish how UBI can resolve or address poverty among poor people with the level and the cause of poverty needing to be established. The cost and the resource to fund UBI is being analysed and the weaknesses around the existing social welfare programmes. A few studies investigated the impact of gender empowerment due to the implementation of UBI.

3.3.5. Research designs and methodologies

This section presents the results of the analysis as it relates to research design and methodology adopted by the researchers in the selected articles, namely the nature of the study, the methodological classification, the research strategy, the data collection technique and the data analysis technique.

3.3.5.1. Nature of the selected studies

Descriptive research aims to explain a phenomenon, situation or a behaviour of sample population accurately and systematically based on the data collected for the study. Table

12 below represents the nature of the studies adopted by each of the 50 academic articles analysed in this study.

Table 12: Nature of the study

Nature of Study	Number of Academic
Historical Research	1
Descriptive Research	48
Experimental Research	1
Total	**50**

The findings indicate that 48 (96%) of 50 articles of the studies performed on UBI have been to describe a certain phenomenon of UBI (descriptive research). Only one article out of the 50 articles selected applied a historical research study which gives a clear indication that UBI is not a historical concept as many scholars are still striving to understand UBI. One academic article applied an experimental research study as the authors were assessing the impact of UBI in one area where a piloting programme was done.

3.3.5.2. Methodological classification

The nature of the data is the type of data used in the study (Bacon-Shone, 2016:13). There are different types of data; this section focuses on identifying whether the data used in the journal articles was qualitative data, quantitative data or the mixed methods.

The element of qualitative and quantitative or mixed data enables the analysis of the nature of the literature data. Quantitative data is data that can be expressed or counted in numbers. This type of data is objective and definitive as it can be expressed numerically (Bacon-Shone, 2016:13). According to Bacon-Shone (2016:13), qualitative data is data that is not numerical in nature and is gathered from sources such as documents, observations, responses to questionnaires and information from interviews. The mixed method is the combination of both qualitative and quantitative methods in one study.

Table 13 below, illustrates the main research methodology identified in the 50 journal articles selected for this study, followed by a discussion of the results.

Table 13: Methodological classification

Methodological Classification	Number of Academic
Qualitative	45
Quantitative	4
Mixed Method	1
Total	**50**

Table 13 illustrates that 45 (90%) out of the 50 articles selected for the purposes of this study applied a qualitative methodological classification. Therefore, the study was aimed at the theoretical aspect of the UBI literature. The findings suggest that there is a possibility of future research for more quantitative research to be done in order to establish the quantitative impact of UBI where it was piloted and also assess the feasibility and the sustainability of UBI to enable implementation and commitment from the political leaders.

3.3.5.3. Research strategy

Research strategy refers to an overall plan to conduct research and illustrate the methods or the approach followed in collecting data for this study. Table 14 below lists the strategies followed in collecting data.

Table 14: Research strategy

Research Strategy	Number of Academic Journal
Archival research	48
Case study	1
Field experiment	1
Total	**50**

Table 14 has two columns, the first column reflects the types of research strategies adopted in the 50 academic journals selected and the second column reflects the number of academic journals. Archival research was applied in 48 (96%) of the 50 journals selected for the study which is evidence that secondary data was used to conduct the research. Prior studies where relied on to conduct the research; therefore, most studies

conducted the research using Qualitative research methods rather than quantitative research.

3.3.5.4. Data collection techniques

There are two sources of data collection techniques, namely primary and secondary data collection techniques (Hox & Boeige, 2005). Primary data refers to information collected directly from the source while secondary data is the information gathered after another party initially recorded it and is readily available in a form of books or journal articles (Hox & Boeige, 2005). Table 15 below, illustrates the data collection techniques used in the 50 articles selected for this study, followed by a discussion of the findings.

Data Collection	Number of Academic
Secondary	48
Primary	2
Total	**50**

Table 15: Data collection techniques

Out of the 50 academic articles selected, 48 (96%) of the articles used data which was obtained from secondary sources and only two articles used primary data in the form of interviews and questionnaires. In order to answer the research question, most information would have been obtained from secondary sources through studying prior studies.

3.3.5.5. Data analysis techniques

The purpose of this section is to illustrate how the analysis of data was carried out in each of selected academic articles, including the different techniques used in analysing quantitative and qualitative data. Table 16 below, illustrates data analysis techniques which were mainly used in prior studies derived from the literature, followed by a detailed discussion of the findings.

Table 16: Data analysis techniques

Data Analysis Technique	Number of Articles

Correlation analysis	1
Grounded theory	1
Descriptive analysis	4
Regression analysis	1
Thematic analysis	43
Total	**50**

In total, 43 (86%) of the 50 selected academic articles applied the thematic analysis technique to analyse the data. Thematic analysis is the most common technique used to analyse qualitative data, patterns in data are analysed and interpreted in order to establish an answer to the research question.

3.4. CONCLUSION

This chapter discussed the data analysis and findings taken from the 50 academic journals selected for this study. Initially 2 605 academic journals were collected using EBSCOhost and 2 555 were eliminated as a result of duplication as well as not falling into the selected date period. Therefore, the remaining 50 academic articles were carefully analysed and considered to be relevant for the study. The data gathered from the 50 academic articles selected were analysed and presented in the form of tables and where possible percentages were given in order to capture the magnitude the data and to accomplish the research objectives and answer the research questions.

The overarching aim of this study was to determine reasons why UBI was not implemented by political leaders despite its positive outcomes in areas where it was piloted. The 50 academic journals selected for the purpose of this study were analysed using the following elements, namely Authors; Academic Journals; Academic Disciplines; Perspectives; Theoretical framework; and Research Design and Methodology.   Moreover, as indicated in Chapter 2, this research is a descriptive qualitative study and the approach followed is a systematic literature review where themes or constructs were identified from the selected academic journals.

This study reveals that 52% of the academic articles selected were multi-authored and this is evidence that the research on UBI was looked at holistically by various authors from different fields of expertise. This statement is further supported by the findings from Table

6 on page 29, where 48% of the studies where published from both the field of economics and social sciences. This indicates that the UBI phenomenon was broadly researched in order to establish how the vulnerable in society, particularly the low income earners and the unemployed including those who had lost their jobs due to poor economic growth and changes in technology, can be assisted by the implementation of UBI. Moreover, this study highlights that 18% of the articles where coming from the field of political science. Political leaders have a vested responsibility in drafting policies and making decision. The study on UBI received less exposure in the field of political sciences and this could have contributed to non-implementation of UBI by political leaders. The collaboration with other authors from the field of economics and social science further indicates a growing number of discussions surrounding UBI which could result in more awareness and subsequently implementation by political leaders. Furthermore, this study reveals that none of the studies in the 50 selected academic journals were conducted from a study field of accountancy or management sciences. As reflected in Table 10 on page 38, 82% of the selected academic articles did not specify the types of tax which could be used as a source of revenue to fund UBI. Studies from the field of accountancy or management sciences could have assisted in finding adequate and effective fund models for UBI. This study has revealed that more collaboration with authors from the field of accountancy or management science is vital as these disciplines could assist in determining which types of tax or other sources of income could be used to fund the implementation of UBI.

From the academic journals selected for this study, 11 themes or constructs were identified and discussed in detail. . The analysis of the selected academic articles provided answers to the research questions and research objectives of this study on why political leaders are reluctant to implement UBI. There are, however, many factors which prevent political leaders making proactive decisions to implement UBI and were holistically looked into through analysing and interpreting the constructs extracted from literature. Although the piloting of UBI has been successful in many parts of the world it does not guarantee the same outcome in all countries due to factors such as the economic growth, the political stability and the size of the population. These factors must be taken into account and it is evident that some of the current social systems do not need to be replaced by UBI, as UBI will not be adequate to resolve all of the challenges experienced by the existing social welfare system**.**

CHAPTER 4:
CONCLUSION

4.1. INTRODUCTION

This chapter concludes this mini-dissertation and presents a summary of the findings and conclusions. The findings are discussed in light of the data analysis conducted in Chapter 3. The findings will be presented concurrently with the research objectives in order to determine whether they have been met or not. Some limitations have been identified and future research is, therefore, recommended in those areas. This chapter ends with concluding remarks.

4.2. SUMMARY OF FINDINGS AND CONCLUSION

The debate surrounding UBI has over the years gained momentum worldwide, for example in countries such as the USA, United Kingdom, Canada and gradually gaining traction in South Africa. The purpose of this study is to investigate the reluctance of political leaders with regards to UBI because the onus rests with political leaders to make decisions and implement the strategic plan and policies. A number of conclusions can be drawn from the findings presented in Chapter 3 pertaining to the research objectives and research questions of this study as illustrated in section 1.3 of Chapter 1. However, the conclusions derived from these findings cannot be generalised to the rest of the countries.

The first research objective of this study was to determine the factors which influence and affect the implementation and non-implementation of UBI. The in-depth analysis of the data set identified a lack of employment opportunities, poverty, poor economic growth and income insecurity including the threats posed by the advancement in technology and automation propelling political leaders to make a decisive decision to implement UBI (Rallo, 2019; Marais 2020; De Wispelaere & Stirton, 2012; Bonciu, 2018, Goldsmith, 2010; Zon, 2016). Despite being able to resolve the current challenges faced by the current targeted social welfare systems in many countries, there are still setbacks preventing political leaders from implementing UBI. Whaples (2015) proclaims that UBI will create an opportunity for the capitalist to dictate the terms of labour, such as paying low income to the workers knowing the state will take care of them. FitzRoy and Jin (2018) uphold that

UBI may reduce labour supply and impact the labour market as well as the economy. These findings support the notion of conducting research through collaborating with other authors from diverse disciplines to ensure that issues surrounding UBI which affect social and economic factors are both looked into holistically and all risk identified is mitigated prior to the implementation or even before UBI could be rejected by other authors. When all risk or challenges raised by Whaples (2015) and FitzRoy and Jin (2018) are addressed, then political leaders and policy makers have the appropriate grounds to ensure an effective and efficient implementation of UBI.

The second objective was to determine the reasons why political leaders are continuing to implement the current social grant system even though this system has not addressed the concerns raised by society in general. Hamilton and Mulvale (2019) and Stevens and Simpson (2017) point out that the current social welfare system is targeting certain individuals, but does not cover their necessities and will leave many individuals in poverty and children suffering from malnutrition. In addition, due to low income received from the targeted social system, other individuals could suffer from psychological stress and depression and end up becoming alcoholics or taking drugs (Hamilton & Mulvale 2019; Stevens & Simpson 2017). Gross (2015) asserted that there is an imperial connection between unemployment, income insecurity and mental well-being due to constant fear of losing a job or not having enough money to pay bills.

The current social welfare system is easy to manage and control, with less financial burden when comparing it to cost associated with implementing UBI. In addition to social grants received under targeted social welfare, the government also needs to balance the budget available for free services such as education, the health system, housing and other social services. For the government to continue to provide social services and in addition, grants to each citizen could have an impact on service delivery due to financial constraint. Consequently, this will negatively affect individuals from a disadvantaged society who depend on government's free social services. This study established that cost associated with implementing a UBI could be the reason why political leaders are still trapped in the current social system. The current targeted social welfare system does not need to be abolished, however it should be considered concurrently while UBI is gradually introduced.

The third objective of this study is to assess the strategic plan put in place by the political leaders to address poverty, unemployment, and changes in technology affecting the

human labour market. Based on the selected academic journals, the focus was on reasons to implement or not to implement UBI as only a few authors highlighted their strategic plans to address the above-mentioned social injustices. In a country such as China, there are various successful poverty alleviation programmes in which the poverty household register was developed and assisted in implementing a targeted poverty alleviation plan. A minimum guarantee programme was also launched with the main objective being to bring minimum income up to a level where individuals are able to afford necessities. In addition, pensioners' income has been increased and has set the household income above the poverty line (Zhen *et al,* 2017). In South Africa, there are various poverty reduction strategies in addition to the current targeted social welfare programmes which mostly focus on old age pensioners, children, individuals living with disability amongst others. The programmes include Human Resource Development programmes such as learnership and internship and also providing financial and non-financial support for Small Medium and Micro Enterprises. Moreover, the establishment of employment programmes such as the Expanded Public Works Programme created temporary work opportunities for the unemployed and poor people. As such, it is believed that providing the poor with fruitful employment opportunities can go a long way towards reducing poverty rather than providing money for free. Prominent leaders who subscribe to this viewpoint have suggested that job creation rather than giving individuals money for free should be at the centre of all poverty reduction strategies (Abedian, 2004; Ravallion, 2019).

Corruption makes it harder to meet fundamental needs, such as food, health, and education which affects the poor even harder (Yusuf, Malarvizhi & Mazumber, 2014). The current social welfare system is unable to lift individuals out of poverty due to the fact that monetary grants allocated are insufficient. Tackling corruption and fraud can, therefore, assist the state to prioritise social welfare and divert the funds to social welfare programmes which address social injustices and thereby, combat poverty and improving the economic growth (Yusuf *et al.*, 2014).

Lastly, the final objective of this study is to determine the funding model and costs associated with UBI. Eskelinen and Perkiö (2018) indicate the cost to fund UBI will be three times the cost of the targeted social system. Full-scale UBI would, therefore, require substantial increases in government revenue (Banerjee *et al.*, 2019). The increase in

government revenue also depends on the economic growth level, population size, political stability and the infrastructure to ensure the implementation of UBI is efficient and sustainable (Goldsmith, 2010:299; Eskelinen & Perkiö, 2018). Wealth tax, consumption tax, resources tax, corporate tax and individual tax are mechanisms that could be considered as sources to fund UBI (Špeciánová, 2018).The ability of the government to collect money from these tax streams is minimal due to UBI impacting the labour market, as individuals would no longer be willing to work and in addition robots will be taking over the labour market (Morley *et al.*, 2019:18). Moreover, taxpayers will be discouraged to work as they are afraid of being taxed and thereby, create an opportunity for taxpayers to evade tax and be involved in corruption activities.

Based on the findings from Chapter 3, it is clear that UBI has been researched extensively (with the exception of African countries) by many authors including collaboration with other authors to ensure the quality of the study. UBI is not only a social science matter but it has gained attraction in other fields of study such as economics and politics. The majority of the selected academic articles were researched from a USA point of view with fewer studies done from an African country's perspective, this is an indication that more research needs to be conducted in relation to African countries. Few of studies have followed an empirical study approach with the majority using qualitative research methodology.

UBI has gained considerable support worldwide, with advocates claiming positive effects on income security, unemployment, social exclusion and flexibility across the life cycle (Standing, 2008). In addition, UBI has been piloted in various countries and the outcomes were encouraging. The approach followed during the piloting of UBI was criticised extensively, meaning that the reported positive outcomes remain questionable. The implementation of UBI is, therefore, not a simple task as a number of challenges were identified and need to be taken into account to ensure the sustainability of UBI in the foreseeable future. Factors such as cost implications, whether it should be universal or targeted and what the cost will be for each individual remains a debatable issue and this could have an effect on the policymakers and political leaders to implement UBI.

4.3. LIMITATIONS

This study only focused on data extracted from three databases, namely EBSCOhost, ProQuest and Emerald, however, there could be other additional sources that could have been used to extract quality and relevant data. This study only focused on data from the previous 15 years ranging from 2004 to 2008 (5 years) and 2010 to 2020 (11 years) therefore, relevant articles could have been omitted for the period before 2004. The research questions and the objectives of this study was to investigate the reluctance of political leaders to implement UBI, therefore the current legislation, strategy, or the policy of the political leaders were not taken into account for the purposes of this study. With regards to the data sample, only fifteen of the articles included in the study were listed on the ABDC journal listing, which might have an impact on the reliability and quality of data. However, the journals used were peer reviewed, which means a certain level of credibility and reliability can be assumed.

4.4. FUTURE RESEARCH

Future research in the following areas are therefore recommended:

- Theoretical nature of the study of the studies used for the purpose of this literature review, 90% followed a theoretical research methodology as opposed to an empirical research methodology, therefore, future researchers could focus more on empirical research and perform an impact analysis in areas where UBI was piloted. Further studies could build on this systematic review to investigate the reluctance of political leaders in implementing UBI by gathering primary data from political leaders and other stakeholders through interviews and questionnaires.

- More rigorous pilot studies: a number of authors raised concerns regarding the loopholes found in the piloted projects, for instance that it did not replicate the objective of UBI as it has only targeted individuals from poor backgrounds instead of being inclusive. Future researchers could, therefore, consider doing a pilot project that replicates the objectives of UBI.

- Increasing the breadth of the data for review: this study used a small number of academic articles extracted from a few databases, therefore, future researchers could explore using different databases and extract more data in order to gain a better understanding of the reluctance of political leaders using UBI and this in turn will create an opportunity to have a broader coverage of other countries.

4.5. CONCLUDING REMARKS

Basic income is needed to combat the economic and social issues that have emanated from unemployment and poverty in order to improve the lives of individuals from a disadvantaged background and to restore their dignity as well as to drive the economic growth and development of various countries. The new wave of technology and global advance in digitalisation have altered the structure and nature of work (Zhen *et al,* 2017). This new development had not only brought new labour markets, but resulted in an increase in concerns surrounding future job losses, income insecurity and poverty.

UBI appears to be an alternative option to resolve these challenges as the current system had not been able to meet the needs of all the individuals in alleviating poverty and other social injustices. Furthermore, the current social system was not designed to cater for changes in technology which could have an impact on the individual's income security which could lead to poverty.

This study sought to establish political leaders' reasons for not implementing UBI. Ultimately a conclusion can be drawn from this study that, due to the unavailability or lack of funds to finance UBI, making the distribution of basic income to every citizen in the country will pose as a challenge to political leaders. Eskelinen and Perkiö (2018) asserted that UBI will cost governments three times more than its current fiscal budget, taking into consideration poor collection of revenue by government and the increase in avoidance of tax. Therefore, the implementation of UBI could bankrupt the state and this could negatively affect the economic growth.

The advocates for the implementation of UBI suggest an introduction of wealth tax and an increase in property tax, indirect tax and resource tax to fund UBI. From this study it was determined that the suggested types of taxes were never tried and tested to ensure sustainability in the future and consider that when UBI was piloted, it was in most cases, funded by non-profit organisations, therefore, there is no concrete evidence that this tax reform will be adequate to fund UBI when it is implemented by political leaders.

Critics are saying the distribution of basic income should not be universal but to rather target specific individuals who are unemployed and living in poverty because by giving

money to those who are above the poverty line will defeat the whole objective and purpose of UBI. Thus, by targeting specific individuals will ensure that the scarce funds are channelled in the right direction and will benefit the relevant individuals.

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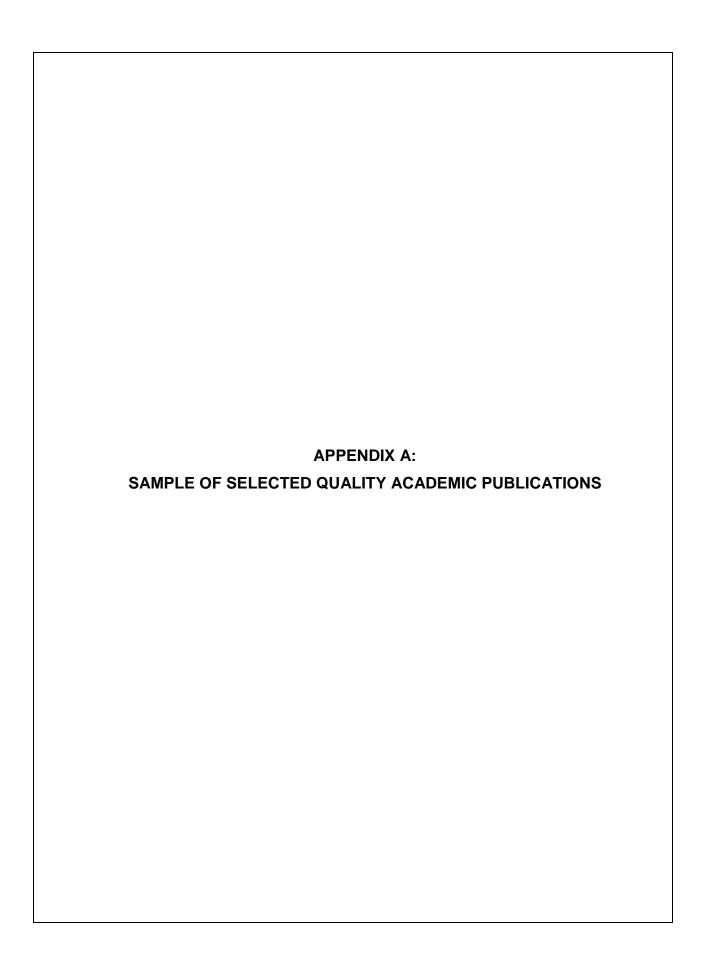
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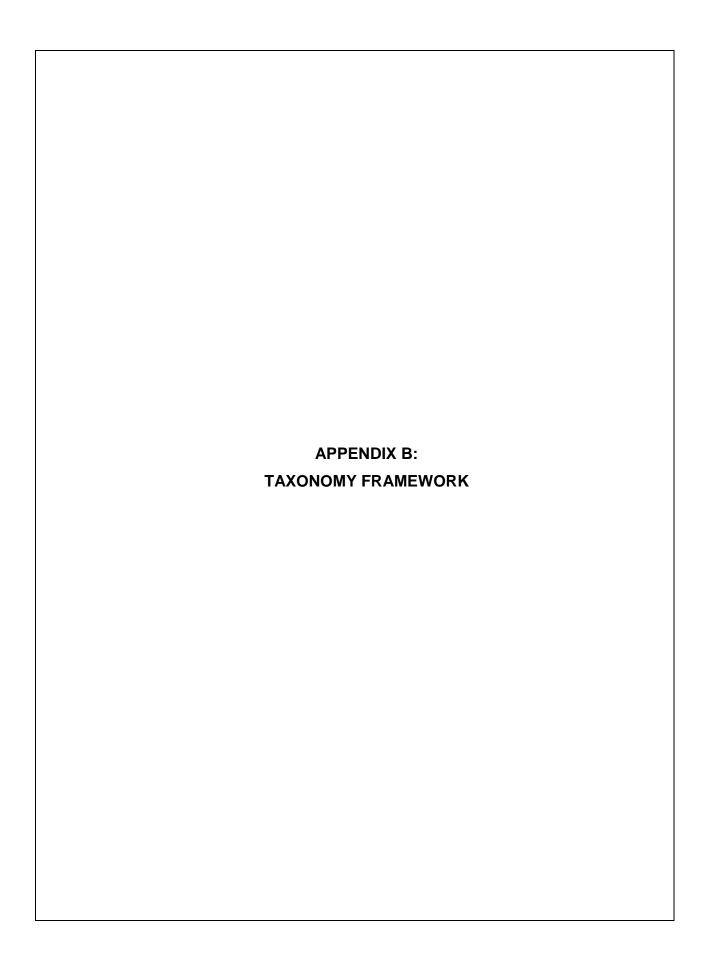
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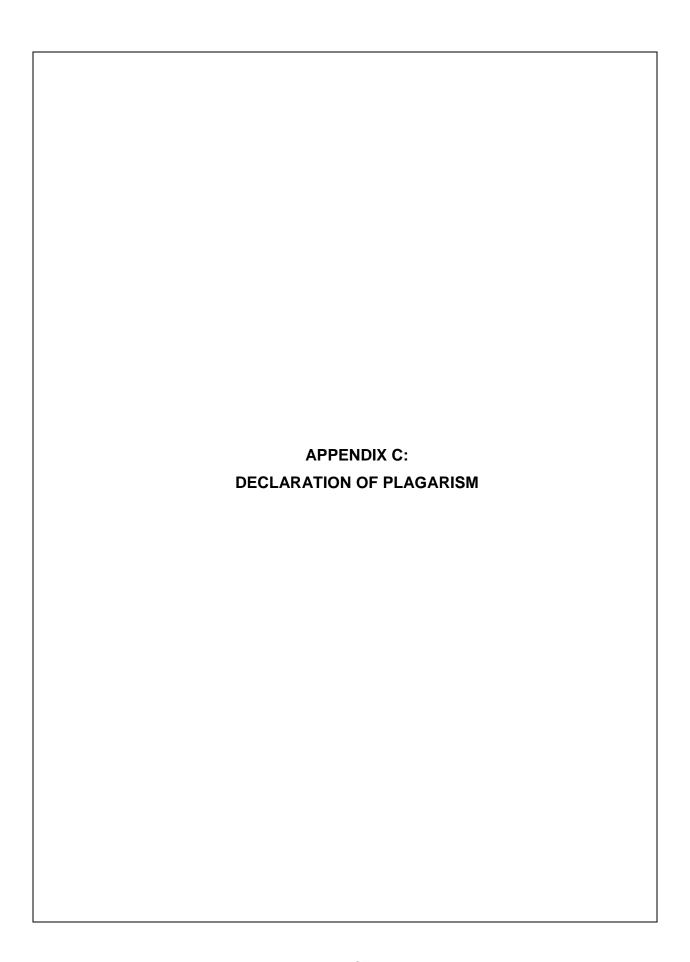Zon, N. 2016. *Would a universal basic income reduce poverty?* Maytree Foundation.

APPENDIX A:

SAMPLE OF SELECTED QUALITY ACADEMIC PUBLICATIONS

List of selected quality academic publications

Name of the Journal	A* Rated	A Rated	B Rated	C Rated	Total number
Accounting and Business Research		√			1
Annual Review of Economics			√√		2
Basic Income Studies				√√√√ √√√√	9
Canadian Public Policy			√		3
Development Policy Review			√		1
Independent Review				√√	2
Journal of Development Effectiveness				√	1
Journal of Economic Perspectives				√	1
World Development		√√			2
Total	0	3	4	13	20

APPENDIX B:
TAXONOMY FRAMEWORK

Taxonomy Framework	
No	**Element**
1	Perspective (country):
2	Perspective (taxpayers):
3	Science disciplines
4	Constructs
5	Types of taxes
6	Variables
7	Research
8	Design
9	Data analysis Technique
10	Research
11	Design

APPENDIX C:
DECLARATION OF PLAGARISM

DECLARATION REGARDING PLAGIARISM

The Faculty of Economic and Management Sciences emphasises integrity and ethical behaviour with regard to the preparation of all written assignments.

Although the lecturer will provide you with information regarding reference techniques, as well as ways to avoid plagiarism, you also have a responsibility to fulfil in this regard. Should you at any time feel unsure about the requirements, you must consult the lecturer concerned before submitting an assignment.

You are guilty of plagiarism when you extract information from a book, article, web page or any other information source without acknowledging the source and pretend that it is your own work. This does not only apply to cases where you quote the source directly but also when you present someone else's work in a somewhat amended (paraphrased) format or when you use someone else's arguments or ideas without the necessary acknowledgement. You are also guilty of plagiarism if you copy and paste information <u>directly</u> from an electronic source (e.g., a website, e-mail message, electronic journal article, or CD-ROM) without paraphrasing it or placing it in quotation marks, <u>even if you acknowledge the source</u>.

You are not allowed to submit another student's previous work as your own. You are furthermore not allowed to let anyone copy or use your work with the intention of presenting it as his/her own.

Students who are guilty of plagiarism will forfeit all credits for the work concerned. In addition, the matter will be referred to the Committee for Discipline (Students) for a ruling. Plagiarism is considered a serious violation of the University's regulations and may lead to your suspension from the University. The University's policy regarding plagiarism is available on the Internet at *http://www.library.up.ac.za/plagiarism/index.htm.*

For the period that you are a student in the Faculty of Economic and Management Sciences, the following declaration must accompany **all** written work that is submitted for evaluation. No written work will be accepted unless the declaration has been completed and is included in the particular assignment.

I (full names & surname):	Marothi Salome Ngoetjana
Student number:	19196327

declare the following:
- I understand what plagiarism entails and aware of the University's policy in this regard.
- I declare that this mini-dissertation is my own original work. Where someone else's work was used (whether from a printed source, the internet or any other source), due acknowledgement was given, and reference was made according to departmental requirements.
- I did not copy and paste any information directly from an electronic source (e.g. a web page, electronic journal article or CD ROM) into this document.
- I did not make use of another student's previous work and submitted it as my own.
- I did not allow and will not allow anyone to copy my work with the intention of presenting it as his/her own work.

	18/11/2020
Signature	Date