

To UBI or Not to UBI? Universal Basic Income Creating Value in Rural Areas of Romania

Abstract. People below the poverty line need financial support to meet their basic needs. One type of support is Universal Basic Income (UBI), which is paid to all adults individually, without means-test or work requirement. This paper investigates the effectiveness of basic-income social policies in rural areas of Romania. The author has analyzed possibly the longest-running Universal Basic Income program created by a non-governmental organization. This social experiment has been running for more than fifteen years and counting. Once a thriving bulwark of socio-economic stability in the country, rural areas grapple for decades with the tsunami effect of ill-fated socio-economic reforms of the '90s, which dragged the rural economy and its people into a vicious cycle of poverty. Constant economic migration, depopulation, lack of basic needs, and a generation of orphans – the byproduct of economic migration and lack of education – constitute the new dire reality of a once prosperous blend of small economies. Under these circumstances, providing unconditional guaranteed income, independent of any other revenue streams, seems a natural way to alleviate the effects of systemic, multidimensional poverty. With mostly non-existent government programs and a weak business sector, the responsibility for such targeted interventions rests on the shoulders of third-sector organizations. The study's results prove that such programs' impact and benefits far outweigh their monetary costs and the stigma associated with "social welfare" proposals. Reframing the concept of UBI allows for creating more perfect baselines, a better way of measuring the needs, and means to fulfil these needs more effectively. This, in turn, drives the creation of a more powerful (and meaningful) set of tools for assessing these needs to meet the demand adequately.

Keywords: Universal Basic Income, multidimensional poverty, basic-income policies, blended value accounting, (in)commensuration.

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UBI чи не UBI? Універсальний базовий дохід створює цінність у сільській місцевості Румунії

Анотація. Люди за межею бідності потребують фінансової підтримки для задоволення своїх базових потреб. Одним із видів такої підтримки є універсальний базовий дохід (UBI), який виплачується всім дорослим на індивідуальній основі, без перевірки матеріального становища чи вимоги щодо роботи. У статті досліджується ефективність соціальної політики базового доходу в сільській місцевості Румунії. Автор проаналізував, мабуть, найтривалішу програму універсального базового доходу, створену неурядовою організацією. Це соціальний експеримент, який триває вже понад п'ятнадцять років. Сільська місцевість, яка колись була оплотом соціально-економічної стабільності в країні, десятиліттями бореться з ефектом цунамі невдалих соціально-економічних реформ 90-х років, які втягнули сільську економіку та її населення в порочне коло бідності. Постійна економічна міграція, депопуляція, відсутність можливості задоволення базових потреб і покоління дітей-сиріт – побічний продукт економічної міграції та відсутності освіти – становлять нову жахливу реальність колись процвітаючих сільських мікроекономік. За цих обставин надання універсального базового доходу, незалежного від будь-яких інших джерел доходу, видається природним способом пом'якшення наслідків системної, багатовимірної бідності. Оскільки урядові програми здебільшого відсутні, а бізнес-сектор слабкий, то відповідальність за такі цілеспрямовані заходи лежить на плечах громадських організацій. Результати дослідження доводять, що вплив і переваги таких програм значно переважають їх грошові витрати та стигму, пов'язану з пропозиціями «соціального забезпечення». Переосмислення концепції UBI дозволяє створити більш досконалі базові показники, кращий спосіб

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вимірювання потреб і засоби для задоволення цих потреб у більш ефективний спосіб. Це, у свою чергу, спонукає до створення більш потужного (і значущого) набору інструментів для оцінки цих потреб, щоб належним чином їх задовольняти.

Ключові слова: *універсальний базовий дохід, багатовимірна бідність, політика базового доходу, облік змішаної вартості, (не)пропорційність.*

1. INTRODUCTION

Rural areas of Romania have become, since the 1990s, for the most part, the *terra incognita* of socio-economic reforms, only to be back in focus for a short time every four years during election cycles. A destructive mix of education inadequacy, economic scarcity, and hopelessness created an outflow of economic migration towards Europe's richer (and farther) areas, a causal nexus for the further erosion of already scarce economic opportunities. The remaining rural inhabitants of ever-shrinking, destitute villages, once being only occasionally poor, have faced decades of economic decay and gradually become cyclically poor, then usually poor, to the point where they are experiencing persistent, multidimensional poverty (Concern Worldwide US, 2022).

Multidimensional poverty takes into consideration several factors, both nonmonetary and monetary. The nonmonetary criteria include food, health, education, social security, housing material quality, and housing services. The monetary criteria apply to people who earn a per capita income below the poverty line, estimated at \$2.15 a day (World Bank Group, 2022). Individuals are in extreme multidimensional poverty if they are deprived of at least three social rights and their per capita income is below the extreme poverty line, which includes only the value of a food basket (Caamal-Olvera et al., 2022). United Nations Development Programme (UNDP) estimates that 1.2 billion people are multidimensionally poor, with 593 million, about half of them, being children under 18 years of age (United Nations, 2022).

People experiencing persistent, multidimensional poverty have only one way to change their *status quo*: targeted intervention on several levels, with a deep analysis of multidimensional aspects of poverty (Duclos et al., 2013), and the subsequent adequate response for each dimension, with the targeted implementation of said response (Alkire et al., 2017). One of the impediments to finding proper solutions to such global problems as multidimensional poverty is the stigma that has always been associated with the state of being poor. This topic has been an uncomfortable truth in the antechambers of power for centuries.

Our research hypothesis aims to prove that eradicating poverty (and overcoming resource scarcity) has to start with phasing out, globally, the shame associated with extreme need, which is primarily financial but not always so, and by acknowledging ALL forms of wealth available to our disposal: financial, manufactured, intellectual, human, social and relationship, and natural; then, by understanding the dire point of no return in a person's life, from where only targeted interventions at individual levels may help, both in monetary and nonmonetary areas.

We present several case studies that argue in favour of the positive socio-economic impact of monetary programs with no strings attached, which will leverage some nonmonetary areas and help foster the socio-economic development of individuals in many neglected areas of the world. While seemingly difficult at first, due to the various challenges associated with its multidimensional aspect, we strongly argue that such focused approaches tend to build wealth in areas once battered by socio-economic storms of the political winds of change.

2. POVERTY AND BASIC-INCOME PROGRAMS

In the mid-2000s, while working with children in rural areas of Romania, researchers noticed that most parents were working abroad, and grandparents, various relatives, or even neighbours unwillingly became *de facto parents* (Ureche, 2022). Only a decade earlier, the whole world was horrified by the studies and movies documenting the "Romanian orphan children crisis", with more than 170,000 children placed in institutions not developing basic emotional skills due to lack of care. The child welfare system of institutionalized children who could not be cared for by their parents was failing them *en masse* (Johnson & Groze, 1994). Furthermore, the EU expansion to Eastern Europe with the 2007 new entrants, Romania and Bulgaria, saw a massive population displacement from rural Romania towards wealthier countries of Western Europe, with Romania having the highest number of migrants from all the Eastern European countries (Eurostat, 2017). Moreover, in the Southwest region where we did the bulk of our work, the demographic dynamics had historically higher values of attrition and had recorded a decrease by 4.63% of the population at the regional level as compared to a decrease of 1.7% recorded at national level (Vilcea, 2014).

Concern Worldwide Organization defines the four types of poverty: the *occasionally poor*, the *cyclical poor*, the *usually poor*, and the *always poor* (Figure 1). The *occasionally poor* are people living in transient poverty who can be severely impacted by a natural disaster such as flooding, earthquake, mudslide, or a tornado. The *cyclically poor* are people who generally rely on cyclical activities, such as agriculture, akin to those from rural Romania. During harvest times, they enjoy a certain abundance, only to lose it and fall under the poverty threshold outside harvesting season or during droughts, flooding, and other disasters. The *usually poor* are the opposite of the *occasionally poor*. They cannot escape poverty alone, but only if one of their family members receives a job or a windfall. Moreover, finally, the *always poor*, the most underprivileged, are consistently under the poverty line, and they cannot move up without an exogenous intervention (Concern Worldwide, 2023).

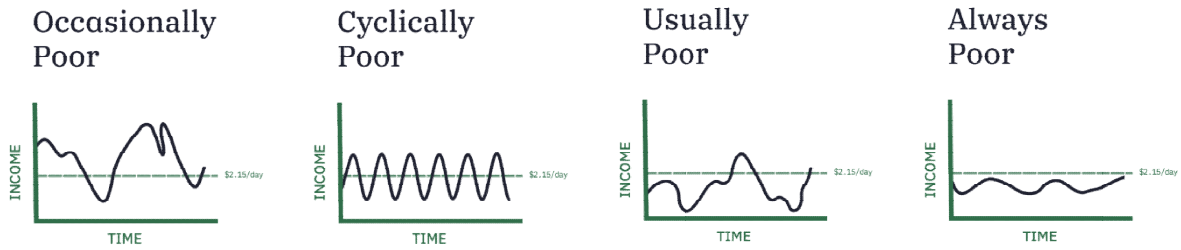


Figure 1. The Four Types of Poverty

Source: concernusa.org

While measuring the impact of basic-income programs on tackling the vicious cycle of poverty, the interventionist researcher aims to flip the poverty paradigm on its head. Through the lens of Nobel Prize winner Amartya Sen, poverty is seen as a “deprivation of basic capabilities” (Sen, 1999); hence, eradicating poverty is a matter of fulfilling such needs. Thus, the occasionally poor would become *occasionally in need* to fulfil basic capabilities, the cyclically poor become *cyclically in need*, usually poor are the *usually in need*, and the always poor are the most unfortunate who are *always in need*.

Generally, basic-income programs are meant to provide a financial safety net for everyone involved, with no strings attached and without the bureaucracy and/or associated administrative costs of means-tested benefits (Allas et al., 2020), which is why they are usually called Universal Basic Income (UBI) programs.

Many countries and cities have experimented with basic-income social programs over the years, which have shown great promise for the future. One considerable drawback to most programs is their limited duration, driven either by limited funding, due either to political or economic implications or simply to the “experimental” nature of the program. As the levels of poverty were decreasing at the end of the second decade of the new millennium, the COVID-19 pandemic caused another 70 million people to fall below the poverty levels (World Bank Group, 2023). Under these circumstances, there is more and more discussion about unconditional basic-income programs, such as UBI.

Many countries, including the United States, Finland, Canada, Brazil, Spain, Germany, Kenya, Iran, and Japan, have considered and implemented various UBI models in the past few decades.

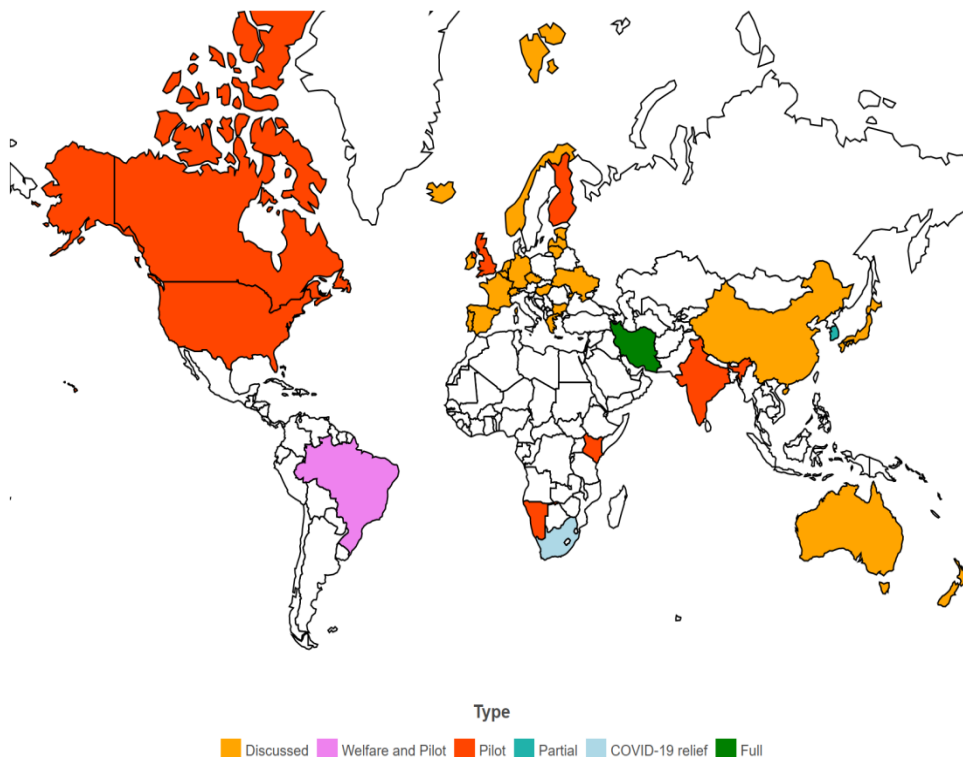


Figure 2. Countries with Universal Basic Income (UBI) in 2023

Source: worldpopulationreview.com

Above (Figure 2) is a map of the countries that have experimented with where UBI ideas and programs have been present over the years. A more comprehensive map below shows the countries where UBI has been fully implemented (Iran and oil-rich countries), as well as countries with pilot programs in place (United States, Canada, Brazil, United Kingdom, Finland, India, Spain, The Netherlands, Germany), partial implementations, COVID-spurred policies, or mere discussions. Although not shown on this map, one successful program has been implemented in Romania since 2007, and it is still ongoing. In our paper, we will share the results of such an

experiment, arguing strongly in favour of basic-income programs, particularly hoping to tilt the balance in favour of Universal Basic Income.

The overwhelming majority of UBI experiments were considered successful, at least through the recipients' perception, which reported increased levels of mental health, physical health, employment, and trust. Below are the results of a two-year Finnish experiment on 2000 of its (unemployed) citizens. They were offered 560 euros every month for two years. The reported areas impacted by the UBI study are mental health, physical health, employment, and trust.

Importance and impact of four well-being factors

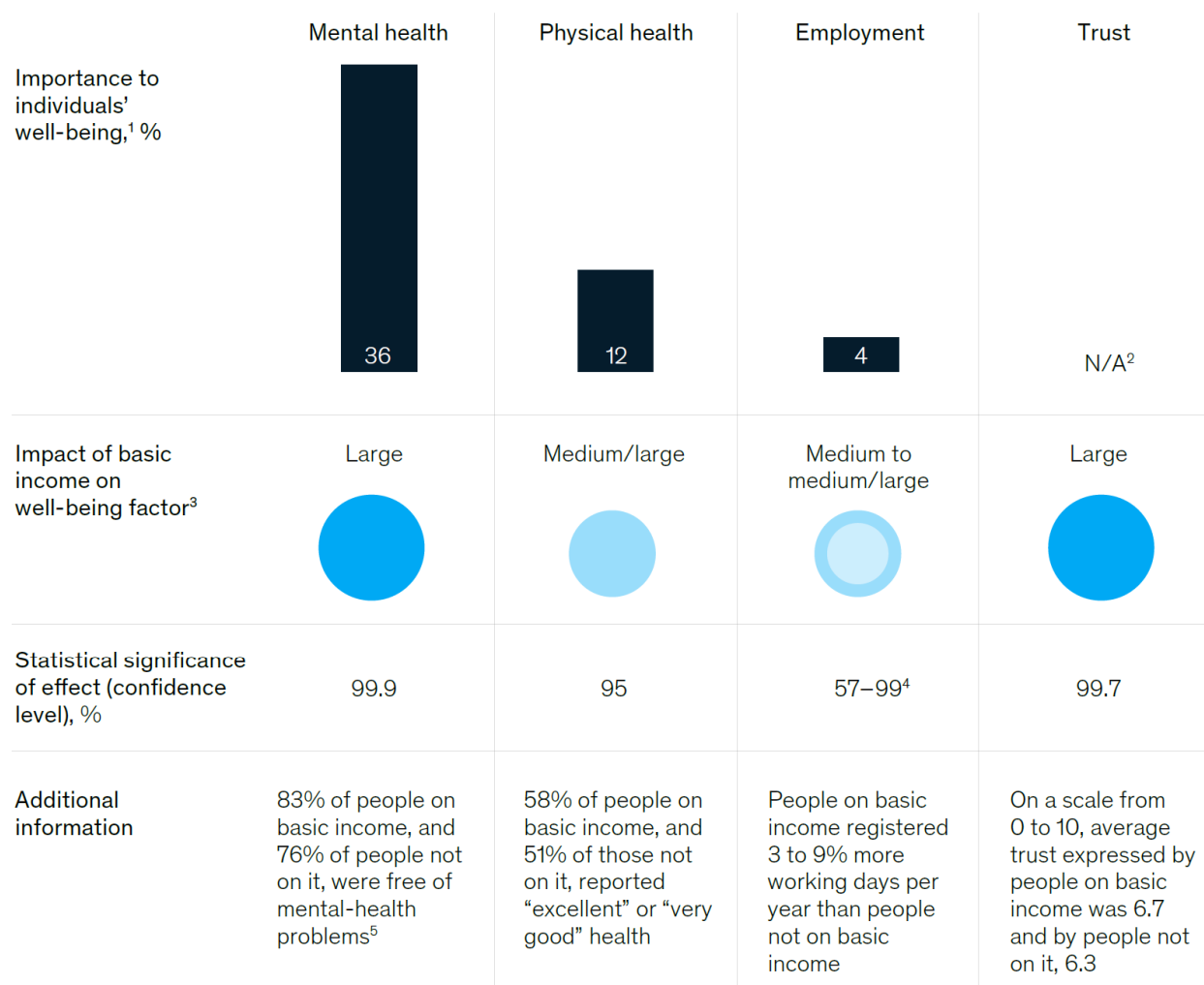


Figure 3. Importance and impact of four wellbeing factors in Finnish study

Source: Allas et al. (2020).

The Basic Income Earth Network (BIEN) is one of many groups devoted to promoting and implementing universal basic income in countries around the world. According to BIEN, the characteristics of Universal Basic Income (UBI) are as follows:

1. Periodic: distributed in regular payments;
2. Cash payment: distributed as funds, not coupons or vouchers;

3. Individual: paid to every adult citizen, not just every household;

4. Universal: it is paid to all citizens, regardless of their situation;

5. Unconditional: there are no employment status requirements or other criteria (BIEN, 2023).

3. RESEARCH METHODOLOGY AND FRAMEWORK

After careful consideration, researchers have chosen the interventionist research (IVR) methodology created by German-American psychologist Kurt Lewin. IVR allows to produce research with theoretical, practical, and societal relevance. This is due to IVR's unique duality of both theoretical and practical output combined with its capacity to effect social change (Baard & Dumay, 2021), and this is why it has been recently receiving increasing interest and attention among management accounting researchers.

Evaluating the impact of social programs has presented researcher with the daunting task of measuring some things that may not be entirely quantifiable. Thus, aiming to define a comprehensive set of tools for quantifying the outcome of basic-income policies on impoverished populace may pose substantial challenges to the simple act of aligning the outputs and inputs, and calibrating the outcome.

The funds for the UBI program were provided through a 501(c)(3) NGO from the United States. Historically, there has been a perception related to financial reporting of the NGOs, namely that they are not reporting well or 'well enough'. Demand for NGOs to become more accountable only renders their actions measurable and their performance commensurable, therefore consistent and comparable. (Power, 1996). In our case, aside from the monetary aspects, several other areas of interest were closely monitored: trust (in oneself and others), health (both physical and emotional), goal setting and goal-reaching abilities of each individual, school or work achievements, extracurricular involvement, as well as their obvious financial achievements.

Through ethnography, action research, phenomenological research, and narrative research, the authors were able to have a better, more detailed understanding of the changes in individuals' lives caused by targeted monetary (and their associated nonmonetary) interventions.

3.1. Multiple capitals, and types of wealth

In measuring performance of an NGO, McCulloch and Ridley-Duff (2019) present an Aristotelian perspective of two seemingly antithetical accounting systems, of two concepts still feuding in the social sphere (Nicholls, 2010), namely for-profit vs. non-profit, the former being designed to gauge shareholders' returns, and the other being mission oriented, not intended to tally return of investments. In their research, the two researchers showcase the existence of *multiple capitals*, namely six: financial, manufactured, intellectual, social/relational, human, and natural, which correspond to *six types of wealth*, thus arguing against the abovementioned paradigms, such as the pursuit of profit (for-profit) and social objectives (not-for-profit) as being divergent (Figure 4). Conversely, measuring the performance of a basic-income program presents a tangible, financial perspective, yet researchers are aware of the importance of a less tangible, non-financial lens for showing dramatic improvements in a person's life. Our goal is to showcase the importance of non-financial capitals as well into creating a well-rounded individual contributing to society.

Oström (2005) distinguishes between natural capital, social capital and human capital, managed through polycentric governance. From a Bourdieusian perspective, social capital, cultural capital, financial capital, and symbolic capital can assume both monetary and non-monetary forms as well as tangible and intangible (Gilleard, 2020). In measuring the impact of NGOs programs, O'Dwyer and Unerman (2006) favor of an expanded concept of accountability, to a wider set of stakeholders, which is anyone who may be impacted by the organization's activities. This stakeholder approach is meant to create added accountability and greater value for all parties involved (Freeman, 2010), with a more holistic accountability 'expands the concept of' performance.

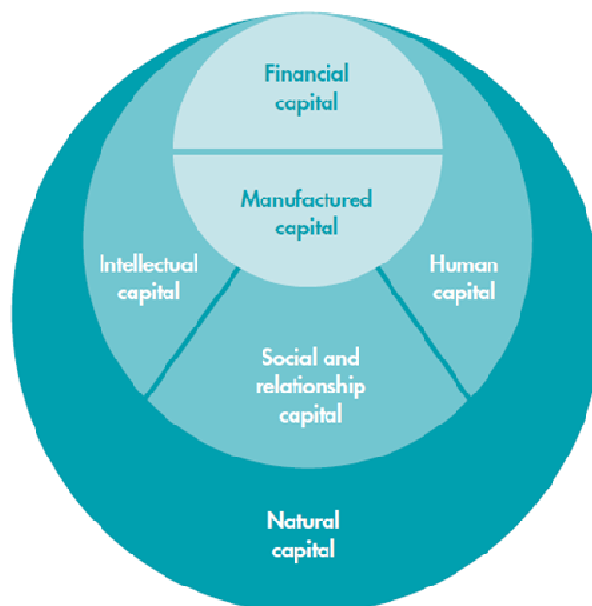


Figure 4. IIRC Representation of Six Capitals

Source: IIRC (2013).

The International Integrated Reporting Council distinguishes between six types of capital: financial capital, manufactured, intellectual, human capital, social and relationship capital, and finally, natural capital, as shown in figure 4 (IIRC, 2013).

Aristotle did not look at economics through the narrow lens of simply increasing the financial capital, but considered a well-ordered society, with a more rational and sensible distribution of resources, in pursuit of a good life. A more balanced allocation would also lead to an increase in various other forms of capital, such as the creation of social capital, and the (re)generation of social wealth, alongside the natural, human, and intellectual capitals (Ridley-Duff, Wren and McCulloch, 2019). Oström noticed how social capital is increased rather than decreased through use (Oström, 2005). The same argument needs to be applied to human capital: our skills become better with use.

Measuring the results however can be challenging, especially in a space where multiple capitals coexist and interact in perfect harmony, at the intersection of natural, financial, economic, intellectual, social and relational, and human interests, with the added burden of weighting the commensurable and (in)commensurable altogether (Apostol et al., 2023).

Social return on investment (SROI) is a technique originally devised in the United States, designed to measure socio-economic and environmental impact, and combines cost-benefit analysis, stakeholder engagement, financial proxies and project improvement. This can be used for a small activity, or a project, or expanded to the entire organization. It can be applied to every sector: government, business, and NGOs (Maldonado & Corbey, 2016).

The process of framing performance measurement creates structures of calculation, and action. To assist with the analysis of performance calculation, Callon and Law (2005), as well as Callon and Muniesa (2004), break down the process into three stages:

First, the relevant entities are sorted out, detached, and displayed within a single space. Note that the space may come in a wide variety of forms or shapes: a sheet of paper, a spreadsheet, a supermarket shelf, or a court of law – all of these and many more are possibilities.

Second, those entities are manipulated and transformed. Relations are created between them, again in a range of forms and shapes: movements up and down lines; from one place to another; scrolling; pushing a trolley; summing up the evidence.

And, third, a result is extracted. A new entity is produced. A ranking, a sum, a decision. A judgment. A calculation. And this new entity corresponds precisely to – is nothing other than – the relations and manipulations that have been performed along the way' (Callon & Law, 2005, p. 719, with the emphasis added).

Cuckston (2021) builds on the process, acknowledges the shortcomings of narrow measurements of NGO performance within either hierarchical structures, or imposed, coercive, formal, compliance-based, for organization who voluntarily take responsibility of their actions, and open themselves to public scrutiny.

Acknowledging the tensions between stricter quantification of performance and a more social, holistic view, the researcher favors the latter, which is opening the organization to a wider set of stakeholders (Cuckston, 2021).

A similar construct postulated by Nicholls (2009), 'blended value accounting' brings the mission objectives front and center, with social entrepreneurs using reporting practices creatively as strategic tools for resource assessment, mission fulfillment, expanding reach, and organizational growth.

3.2. The longest running Universal Basic Income in the world

Children Aid and Development Organization is a non-profit organization established in 2003 in California. Through various sources of private funding, it started 2007 a basic-income program that has been running for 16 years and counting.

While IVR produces theoretically interesting contributions, whether a new construct, or a more traditional contribution (Lukka & Wouters, 2022), we have brought front and center another important characteristic feature of IVR projects, which is to have a practical impact in the community where the research is conducted, which is corroborated by our almost two-decade work on this topic, by shaping lives in various communities through basic-income programs.

Our activities with Children Aid and Development have taken researchers to many areas around the world. In the 2000s, few could have been predicted the future massive economic legal emigration from Romania, and its devastating impact on a new generation of future orphans with their parents being alive and well, in other parts of Europe, and starting new families abroad, and abandoning their children at home. Yet, direct observation and empiric data, plus some ill-fated economic reforms that further impoverished rural population, were the sign of the brewing storm of unprecedented economic exodus.

In 2007, persuaded by a local English teacher with good knowledge of the community, researchers started a basic-income program initially with a Roma family of four, two adults and two children. The goal of the program has always been to provide, ultimately, financial sustainability for the individuals, which adds to the overall financial stability of the family, as the individuals are part of their larger family unit, and ultimately part of their community. Ideally, the program goals would extend from individual to their family, then to the community-at-large, to the point of being at one point in time, "universal", accessible to everyone. With the financial sustainability in mind (for the recipients, and the grantors alike), we devised an initially small program, with a few recipients, the youngest being in the 5th grade at the time. The length of the program was supposed to be at least 12 years, so the youngest recipients would have the means to graduate college, and beyond, if necessary.

This basic-income program derived from need, and the main problem for researcher was to quantify the respective need. The easy way is to give everyone the same amount, yet we knew from the community that not

two people have the same needs. We wanted to tailor the program for each recipient, or at least category of recipients, people with common needs. Once the die is cast, and the recipients lined up, the flipside of not fulfilling the need was to introduce risk in our system. We thought in terms of quantifying risk, the risk of not doing anything, the risk of doing too little, the risk of changing nothing, or not enough. The right amount of money given on time equates better progress, less money, less progress, same money, later time, less progress. Hence, first step was to provide an amount based on the projected needs, then have the recipients to agree of asking themselves for more money when their funds are depleted. After a while, we were able to gauge a monthly amount that was appropriate for each recipient, for the time being. We budgeted unforeseen expenses as well, like certain books needed for school, clothes or uniforms for the first day of school, or for the winter season, an occasional laptop every so few years, transportation costs during school season, college tuition, tutoring when necessary, or some unforeseen medical expenses, and so on. At times we undertook small health projects with recipients who were too shy to ask for dentist money, and their dental health was degenerating almost beyond repair. After a bit of health coaching, we convinced them to accept the extra funds, fix their teeth, and enjoy a better quality of life. Eventually, we convinced the grantees to bring up any extra expenses, so at least we can consider them, and decide on their timing. Thus, by knowing our recipients and developing good communication with them, we were able to fulfill their needs in the most optimal way, while building confidence and trust.

During the program, several areas of interest were closely monitored: *physical health*, *mental health*, *emotional health*¹, *trust* (in oneself, also in exogenous interventions from third party organizations), *goal setting*, and *goal reaching*, *scholastic progress*, *extracurricular activities*, *personal achievements* (other than scholastic), and the overall *financial stability* of the recipients over time, especially as a condition to exit the program. In noting and measuring results, researchers used an outsider and insider perspectives, etic and emic, for a better understanding of the program's outcomes.

Albeit long term, our basic-income program was still a temporary endeavor for each recipient, and it was extremely important to define beforehand the measure of success. In the end, in order to sustain the growing levels of need of our recipients, as well as manage the research's finite budget (which was also never really set in stone), we had to respond to the following questions:

1. Need – What are the needs to be fulfilled?

2. Fulfillment – When is the need fulfilled? Punctually, how much one needs on an average month, how much to budget for emergencies in a contingent fund, and how much to be next year's budget, given the fact that new recipients may exit, or enter the program.

¹ For the purpose of this research, we have used terms *emotional health* and *mental health* interchangeably, although they are not, just in the sense that one validates the other (author's note).

We were clearly aware that needs – especially of a growing person – are also growing, so researchers had to set up what we called a *progressive UBI*.

3. Unknown unknowns – aside from setting a contingency fund, what if there are needs that are not known to the researchers? Even the recipient may not know what they need, so despite the researchers' best intentions, many of the needs may be still unmet.

4. Assessing progress – how fast the needs are met / fulfilled. Generally, with school-age children, when graduating from the highest institution they decide (in conjunction with the program's management) to graduate. However, there were situation when even after graduating, the recipients didn't find a job right away, so they stayed in the program for a little longer, to fulfill the true purpose of a Universal Basic Income.

5. Measure of success – When is the need really complete? Would the researchers be able to determine the program completion; would the recipient be lured by easy gains into staying longer in the program? (luckily this was assessed properly by the recipients themselves, as their goal setting, *and* goal achieving capabilities, coupled with increased emotional intelligence, allowed them to evaluate their own progress quite accurately).

Based on the aforementioned settings, our little basic-income scheme became quickly a Progressive Universal Basic Income Program, where we have successfully used own progressive algorithms for the optimal financial stability of the recipients', and the program. It quickly grew towards 80 recipients.

The first notable observation, once the program started, was that the mere act of receiving something moves the needle quite well. The toughest challenges were to gauge how big is the need, whether is a "need" or a "want", and finally how much money to appropriate in order to really fulfill that need². The "nice-to-have" feature of any system is always the one that crashes the budget, so team had to draw a fine line between *needs* and *wants*. Luckily, our recipients were pretty good at doing this themselves. In the world of "wants", many of them were lacking basic needs, so we focused on that.

Later on, while focusing on fulfilling the needs of the program's recipients, coupled with the inherent progress of each participant, created a new challenge of assessing, and constantly managing change. Next, we needed a way to measure the impact of the program, on the individual, on their family and friends, and overall, by his/her contribution to the society at large.

4. MEASURING THE IMPACT

After being in the UBI program for close to a decade, many recipients have "graduated" successfully, while others who just started, are still in the program. Currently several recipients are already married, some with kids on their own. The basic-income stipend helped them through thick and thin, with no strings attached. Measuring the impact of basic-income programs must take into consideration several components. First, there's the

² Today's world is full of "wants", so even the most astute researcher may have a difficult time to assess their own needs from wants (author's note).

impact of such exogenous interventions on the recipients themselves, then on friends and family, and the immediate community. Then, the impact of such program on the society at large.

4.1. Individual impact

The *individual impact* i.e. the subjective effect(s) felt by the individual, is often subjective, and describes the recipient's perception (could be coupled with his/her family, or friends' perception, for a more objective approach).

4.2. Third-party impact

The *third-party impact* is the external observer perspective. It shows the immediate impact of the recipient to his/her group of peers, and family. The third-party effects have been captured externally, through ethnographic research, based on researchers' notes and observations, and semi-structured interviews of the recipient's family and friends. Our research is still assessing the perceived impact of the intervention on individual, while providing a new lens for determining the overall efficiency of the program.

4.3. Societal impact

The *societal impact* of such basic-income program cannot be underestimated, and can be properly quantified from many angles. First, the financial lens, a mere determination of how the individual will help the society through their earnings, by not being a burden on society. Then, *income taxes on salary*, also on *passive income*. There is also a certain amount of *disposable income* for each financially sustainable recipient that gets pumped back into the economy. There are the *charitable endeavors*, volunteering their time and/or their money for charitable purposes. *Higher levels of physical, emotional, and mental health* also mean less health related issues, and these can be computed in an algorithm, to better understand the impact (or lack thereof) of healthier individuals on society. Social accounting (Bebbington, Brown, Frame, 2007), as well as blended value accounting (Nicholls, 2009) may present us with the right tools for measuring the impact of basic-income programs.

There are several important aspects of measuring the impact of basic-income programs on people's lives. First, the reluctance of the subjects of being measured, and having their lives reduced to a set of statistics, or to a conference topic. Besides a person's inherent need for privacy, constantly challenged during our days of social media dominance, we attribute their unwillingness to be measured to the persistent, pervasive (and much publicized), poverty stigma, which stymies the poverty eradication efforts. What is labeled as 'poverty' is not a disease, just a need, a deprivation, or a lack, waiting to be fulfilled. During our lifelong quest for a better society, and with an old adagio in mind, which states that 'what you resist, persists', we have shied away from focusing on 'poverty', yet put the emphasis on 'fulfilling the needs' and 'building skills and capabilities', instead. History clearly shows that 'wars on poverty' end up in Pyrrhic victories, with the first casualties being the very people that need to have their needs fulfilled, the most

vulnerable ones. Changing the optics on poverty, albeit slightly, may very well be the much needed game changer in our never-ending exploration of a better future.

The second matter with measuring the continuous and wholesome transformation of an individual may very well be the very act of measuring. The stream of researched framing constructs in performance measurements needs to take into account (and dispose of) the observer's relativity. Apart from this, social-income programs impact the lives of their recipients to a degree where the measurable output is impacted as well. Even a slight change in funding is creating ripples in people's lives, which makes measuring the impact of social-income programs akin to the Heisenberg's uncertainty principle – the relative precision of measuring two different factors, the position and the momentum (of a particle) at the same time. Once the precision in measuring one quantity is increased, the precision in measuring the other is diminished (Hilgevoord and Uffink, 2016). For this reason, a change in funding, or any other input parameters, which increases or decreases the momentum of a person's life, makes measuring the exact outcome more laborious, especially when at stake are multiple capitals, and multiple types of wealth, all being paramount to our research.

One surprising outcome arose out of our study: as diligent researchers, we have initially devised our own measure of success, for a recipient to graduate the program: possible complex calculations that may show that he/she are financially sustainable. Yet it turned out that we were slightly shortsighted, as each of our recipients told us beforehand about their need to exit the program, as they felt completely sustainable, and empowered by the outcome of the program. Their needs were fulfilled, they didn't need the program's financial stipend, and they added – invariable – that we can further offer the opportunity to another child in need. This was possible the biggest outcome of the program, knowing they all our graduates have developed strong emotional, mental, physical, and financial structures that they felt confident enough to be on their own. As a matter of fact, researchers never prodded anyone to exit the program, all the exits were voluntary. As such, none of the recipients stayed in the program more than necessary. As we have fulfilled their needs, they responded in-kind, and let us know as soon as their needs were fulfilled, and their goals met (which says a lot about the chosen metrics).

5. CASE STUDIES

One important thing that factored in to the success of the program is the fact that besides a stipend, the recipients have been through various programs to develop emotional intelligence, financial intelligence, goal-setting, goal-reaching, and they enjoyed a wide range of extracurricular activities, which allowed them to create inner structure in order to understand when their needs were properly fulfilled, and – most important – function on their own. Below are three case studies, each of the recipients have stayed in the program for an average of a decade. Aged 30 or less, currently they are accomplished human beings, and great contributors to the society.

5.1. Christian

Christian was born in a Roma family with great emotional and intellectual intelligence, and with limited material means. At 15, he was recommended to us by his English teacher; subsequently, Christian was the first recipient of the program. Having quite an impressive set of scholastic achievements, in STEM, but also in English, and History, he graduated from the prestigious Poly University of Bucharest with a degree in Computer Science. At that time, Christian moved from the countryside to Bucharest, where he volunteered extensively with non-profit organizations dedicated to helping impoverished Roma families. His background, his volunteer work, and other extracurricular activities gave Christian a good understanding of financial literacy, and he set lofty financial sustainability goals. Upon graduating from college, and being gainfully employed, he set a goal to save every month a percentage of his earnings. Soon after – alongside his fiancée - bought their first home, paid for completely in a mere four years. Immediately after, he and his now wife, purchased their second, investment home, and are on their way to earn a passive income, alongside their work-generated incomes.

Christian scored high on all fronts, with high marks in *trust* areas, both in oneself, and institutions (non-profits, corporations, and banks as well). His physical health has considerably improved during his time in the program. At 14, he had surgery for a possible malignant tumor, which turned out to be just a scare. Emboldened by his prior health challenges, he devised a *health and fitness program* for himself to lose weight and gain tone and energy, which he completed successfully. His *mental health* had improved, alongside his *emotional wellbeing*. His *scholastic progress* – which we closely monitored – has improved as well, and he found a job easily upon graduation, with Electronic Arts, a leading computer game publisher. From here, he moved to several consulting companies and tech giants, such as Stefanini, Wipro, and Microsoft.

Armed with newfound qualities and achievements, he later met the girl who became his wife, and together have a very happy marriage. He *set goals*, and through diligent work, he built an *impressive portfolio of achievements*. Currently, Christian is happily married, and enjoying the financial stability he always wanted. After several successful engagements in information technology industry, Christian is working for United Nations, now passing the torch, and helping others fulfill their mission in life (*overall improvement from 6.278 to 8.899*).

5.2. Laurel

Laurel has entered in the program in her 9th grade. Unbeknownst to us, a couple of years prior entering the program, she was instrumental in identifying, then catching a thief who was stealing artefacts from Romanian monasteries. The head monk at the monastery where the thief was finally caught was so impressed with her display of intelligence, and prowess, that he recommended her (and her sister) to enter in our program.

Unlike most of our recipients, Laurel and her younger sister lived in the city. The upside, better exposure to

information and possibly better public schools, better access to healthcare. The downside, higher cost of living, more pollution, and more health challenges. Her dad worked for the monastery, in a rural area, at rural area wages, so they were living below city living standards.

During high school, we encouraged Laurel to apply herself in sports as well, so she took on rifle shooting, an Olympic sport. Shortly after, she became the National Champion of Romania, Juniors and Seniors. Despite her success, and vastly improved physical and emotional achievements, her emotional state saw fluctuations. Shooting is a very demanding sport, with a lot of emotional pressure, and one needs to be extremely balanced and centered in order to achieve wider success. We worked with Laurel on improving her emotional fitness, and achieve more inner discipline. At the same time, she got admitted, and on her own academic merits, to the most prestigious business school in Romania, Faculty of Economic Cybernetics, Statistics and Computer Science, ASE Bucharest.

In this time of intense sports and academic competition, her financial needs grew, so the cash stipend was adjusted accordingly, to include food, clothing, college textbooks, as well as professional therapy, and necessary sports equipment. Her results have improved and became steady, to the point that Laurel started to win international medals on a regular basis. She is European champion in 2019 Air Rifle 10 m (individual event), and European Champion in 2018 with the team. Also, 3rd place in 2019 with the team at C.E. Also, Laurel won 1st place at the European Games Minsk 2019 Air Rifle Trial, 3rd place at the 2019 Air Rifle World Cup Final, 1st place at the World Cup in Munich, Germany, and 1st place at the World Cup in Guadalajara, Mexico. She still holds the European record in her discipline. Laurel represented Romania at Tokyo Olympic Games in 2020, where she ranked in top 10. She is by far the only Romanian woman athlete who has enjoyed this level of success in her sport.

Her achievements owe a lot to her newfound physical and mental fortitude, made possible with by a modest (at times) basic-income stipend. Laurel scored high on trust, health, goals, financial, and extracurricular activities. While she enjoyed success in college, her sports achievements far outscored her scholastic ones. Her sport achievements also brought Laurel financial stability, by having a stable job with the Romanian Police Force, and perks that came with winning international gold. We are looking forward to cheer for Laurel at the next Olympics in 2024, and inspiring new generations of women in sport! (*overall improvement from 6.722 to 9.333*).

5.3. Gabriel

Gabriel was born in an impoverished family. His parents divorced early, and Gabriel was raised first by his father, who was still struggling with alcohol problems, then moved briefly with his mother, and during adolescence stayed with a family of neighbors. Not having a stable home left some emotional scars, but Gabriel was given outside emotional help and support

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during this time, and was able to cope well with his situation. He was very passionate about History and Geography, and applied himself in many other fields, during his years in a small school from a remote village, where he was shining brightly. However, being in an environment with virtually no competition, he had a lot to catch up during college, which he did with great effort and dedication. He chose to go to Law School, where he distinguished himself in many areas. He graduated in 2019 with a Law Degree from one of the most prestigious universities in Romania, and now he is clerking for a judge in Transylvania, while leading a team of professionals.

Gabriel is currently enjoying a stable stream of income from his job with the Romanian government

administration, which it has given him the much needed *financial sustainability*. Aside from his *academic achievements*, his *trust* levels had shown a significant boost since he entered the program, in the 5th grade. His *emotional and physical health* have vastly improved, his *goal setting and reaching* have been at highest levels since he understood the importance of our exogenous intervention. Recently, Gabriel moved in with his fiancée, soon to be his wife, and they are looking to start a family. (*overall improvement from 6.167 to 8.222*)

Below is an example of assigned scores, and their powerful transformation experienced through the Universal Basic Income program.

Name	Trust		Health		Goals		School / Work	Extracurricular	Financial	AVG
	in Oneself	in Others	Physical	Emotional	Setting	Achieving				
Christian	6.5	6	6	7	5	5	9	8	4	6.278
Laurel	9	6.5	9	7	5	5	8	7	4	6.722
Gabriel	6	5.5	7	7	6	6	9	6	3	6.167

Name	Trust		Health		Goals		School / Work	Extracurricular	Financial	AVG	# of years in the program
	in Oneself	in Others	Physical	Emotional	Setting	Achieving					
Christian	9	9	8	9	9	9	9	9	9	8.889	9
Laurel	9	9	10	10	9	9	9	10	9	9.333	9
Gabriel	8	8	8	8	9	9	9	7	8	8.222	10

Figure 5. Results of the Universal Basic Income program

Source: Author's processing.

6. CONCLUSIONS

In our research, we have analyzed what possibly counts as the longest running Universal Basic Income program created by a non-governmental organization. This is a social experiment running for more than fifteen years and counting. Aside from the obvious, measurable effects, we would like to emphasize the apparently intangible benefits of such programs, as the recipients have overwhelmingly shown improved mental health, emotional stability, trust and confidence, strong goal setting, as well as the concrete, tangible effects, like improved physical health, school grades, goal reaching in general, as well as financial stability, which shows how the impalpable effects translate to the real world, being properly monetized by the recipients. One important concept here is *building mutual trust, and confidence*, which in turn has built self-confidence for the recipients (Allas et al., 2020).

Universal Basic Income recipients invariably score high on *improving mental (and emotional) health*, as well as *developing trust* in themselves, and institutions. This may be one of the most important conclusion here, as the trust in governments has been eroding considerably in the past years, and during the COVID-19 pandemic,

and the decreased levels of mental health are impacting our society as we see it today.

The 2022 Edelman Trust Barometer Global Report (Figure 6) is showing the private, and the voluntary sectors seen as ethical and competent, and effective drivers for positive change. The gap between these two sectors is seen as shrinking, showing the two sectors sharing more common goals, while the governments still have to catch up, at least in public perception.

What we see as a big drawback currently is the fact that UBI programs are mostly considered “experiments”. People’s lives, however, are not “scientific experiments”, and should be treated as such. A Universal Basic Income program needs to be considered a long term endeavor which addressed the needs of the people until these needs are fulfilled.

Another important conclusion from our study is that, with proper training and education, the recipients of such program will develop inner structures that allow them to *function autonomously* and independently, as well as they can *define their own measure of success*, and “graduate” from the program, *without relying indefinitely on outside help*. The latter – alongside the poverty stigma – seems to be the biggest impediment of defining and implementing successful long term basic-income programs.

GLOBAL 24 Not asked in China, Russia, Thailand

NGOS AND BUSINESS MUST ACT AS STABILIZING FORCES

(Competence score, net ethical score)

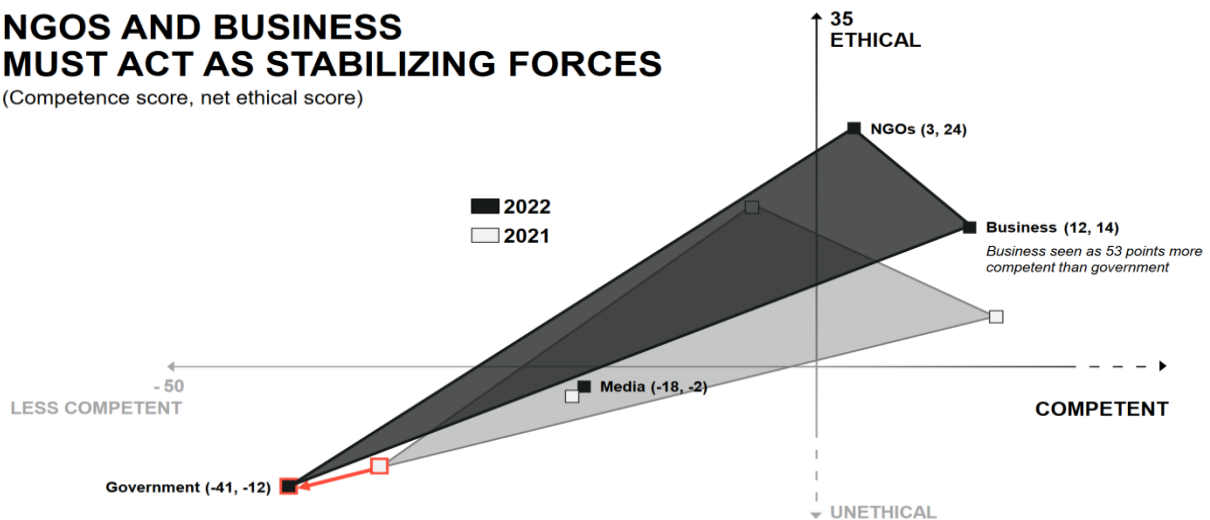


Figure 6. The gap between the private and voluntary sectors is shrinking

Source: Edelman Trust Barometer Global Report (2022).

UBI is not only for people who are unemployed, or considered “poor” and “destitute”. Vulnerability comes at many levels, and post-COVID emotional and mental health is one of them. We live in an increasingly disconnected world, and UBI programs build connections, and trust. With many economies slashing welfare, and health programs, basic-income programs need to carefully consider mental and physical health vulnerabilities of their future recipients, and extend the program beyond considering income as the main eligibility factor.

Basic-income programs need to be *indiscriminate in nature, not in monetary value*. Different people, even from the same family, have different needs. In order to see a meaningful impact, instead of writing a blank check to everybody, a true UBI program needs tailored for the monetary needs of the recipients. Within the same community there are different needs, as well. Before starting any successful basic-income program, there’s a need for a *careful assessment* of each recipient, at various levels (shown in our study), then the monetary quantum allocated needs to be established appropriately from individual to individual, coupled with *non-monetary incentives*, like financial literacy programs, emotional and mental health support, and more that’s needed.

Another important aspect for a meaningful impact is to consider the *growing needs* of the individuals, as they literally grow physically and emotionally, especially children.

One important consideration to UBI programs is the fact the recipients’ level of trust increases, whether in authorities, in organizations, or increases the bonds within the members of the community. The need to feel supported, and the confirmation of such support, can fulfill the needs of many UBI recipients not on a regular basis, but punctually. Circling back to the four types of poverty, there are people in constant need, and people in

occasional need, and the level of basic-income offered to them is not only different, but offered at different times in their lives.

6.1. Removing the stigma on poverty

Tackling the multidimensional poverty requires a Weberian analytic lens, and a multidimensional approach to social stratification. In order to avoid the stigma of handouts for children and their families, researchers advertised the basic-income as a “merit scholarship”, although there were no scholastic criteria in the program. The “merit scholarship” construct instilled a sense of appreciation among the young, and pride among their parents. This was a way to help the recipients of the program, without them feeling the least humiliated, or have their self-esteem suffer in any way.

We noticed early in our approach that poverty-associated shame, and its subsequent emotional scars, could become serious impediments in setting up (and running) proper basic-income programs. Whilst most onus has been narrowly placed on the material condition of poverty, this condition further needs to be viewed as a potentially damaging social relationship where the prevailing norm is marginalizing people perceived as ‘poor’ from ‘mainstream’ society. Moreover, poverty has been reframed for decades as a problem solely of the ‘poor’ themselves, rather than a byproduct of social relations characterized by inequalities of wealth (Lister, 2003). Experiences of stigma and shame are central to the disparaging process of poverty, which serve to regulate relationships between ‘the poor’ and the wider society, including daily social interactions, wider social representations of poverty and ‘the poor’ in everyday social exchanges, and public and media discourses on poverty (Sutton et al., 2014). Reframing poverty as a condition of individuals with needs that are yet unmet may contribute to a better understanding of the

problem, and a better solution, from which basic-income programs can greatly benefit.

In alleviating poverty, we looked at monetary poverty and into growing the financial capital. Also we have looked into the nonmonetary poverty criteria such as health, education, social security, and housing, and their equivalences in other capitals such as human capital, intellectual, social and relationship capital, as well as the manufactured, or the natural capital. Multidimensional poverty needs to be tackled from all sides, as an investment in growing each form of capital. Poverty is a condition that needs to be assuaged, period. The condition of being deprived of three social rights and having per capita income below the extreme poverty line, also called *extreme multidimensional poverty*, it is shared – according to United Nations (2022) by 1.2 billion people, or 15% of our world population, in 111 developing countries. This only makes fulfilling people's needs more urgent. Ideally, their needs have to be met before the cycle of poverty deepens, and before more people fall into poverty. Our interventions targeted individuals who, on the surface, were 'only' cyclically, or usually poor. Yet during difficult economic times, when rich get richer, poor get poorer, and the fine line to extreme poverty gets crossed imperceptibly, yet definitively.

In our basic-income program, researchers attempted to fulfill the needs of a various population categories, from school age, to almost retirement age. The diversity and range of the needs to be fulfilled called for a variety of measures and answers, tailored for each recipient. This is just another criteria making this particular Universal Basic Income program unique in the world.

6.2. Reframing the UBI

There is a distinct possibility that 'universal' in Universal Basic Income to constitute a statement that conditions an egalitarian concept of distributing equal sums of money to the UBI programs recipients'. However, no two people have identical needs. As difficult as it seems to be gauging people's needs, this is highly required in order to ensure correct measurements of the needs, and the impact of the program in fulfilling these needs.

Researchers have determined a need for refining and reframing the Universal Basic Income concepts, like emphasizing the various, and progressive needs of its beneficiaries. Further considering the fact that a family living together is intrinsically united, and not formed by disconnected individuals, the UBI needs to apply to individuals living alone, or to families living together,

equally. This is not a new concept: Chicago School economist George Stigler argued in 1946 for a family-based grant instead of an individual-based grant, combined with supplementary in-kind benefits used on the side (Lehto, 2018).

Henceforth, the UBI concept could (and should) become altered to *include family structures, households, and implicitly all citizens, regardless of age, in necessary amounts, which can be altered as needed*.

There are more ways of rethinking the basic-income concepts, by considering new constructs that express slightly improved notions, for equally improved perceptions. As an example, in the light of reframing the poverty concept itself through the lens of fulfilling of certain (basic) needs, and based on the aforementioned studies showing great improvements of individuals in social-income programs, the Universal Basic Income can be rethought as an 'Universal Basic Achievement' of all the individuals impacted by the program.

A decade-old Princeton study on the effects of extra earnings on individual fulfillment, show that the effects of income on the emotional dimension of well-being satiate fully at an annual income of ~\$75,000, following the principle of adaptation (Kahneman and Deaton, 2010). Being aware of the transient pleasure in a sudden income raise, researchers had to look for additional motivating factors in the areas of personal achievements, making UBI more closely linked to long-term, overall wellbeing. For the individuals scoring high on 'Universal Wellbeing Achievements', UBI became *de facto* 'Universal Wellbeing Income'.

The interventionist researcher has decided to tackle the cycle of poverty through education, proper healthcare, and financial sustainability opportunities. Poverty needs to be viewed the same way as a pandemic that needs a cure at the global level, rather than an individual problem pertaining to the ones deemed as 'poor', yet the cure needs to be tailored more or less on the individual.

Reframing the concept allows for creating better baselines, a better way of measuring the needs, and means to fulfill these needs in a more impactful way. This in turn drives the creation of a more powerful (and meaningful) set of tools for assessing these needs, to meet the demand in a proper manner. It removes the stigma on poverty, and focuses on people's needs, it separates the needs from wants, and creates a better framework for lifting 1.2 billion of the world's poorest out of poverty, towards normal and decent living conditions.

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