Regional Support to the National Government. Joint Effects of Minimum Income Schemes in Italy

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Abstract

This paper highlights to what extent the minimum income schemes of Italian regions improved potential targeting and effectiveness of national minimum income measures introduced in 2017 and 2018. Exploiting detailed survey data on income and wealth of Italian households from the EU-SILC (European Union Statistics on Income and Living Conditions) survey and applying new micro-simulation techniques, I first provide estimates of the overall audience of potential recipients and assess the extent of low-income targeting. I then evaluate the extent to which national and regional minimum income schemes decrease poverty and income inequality indicators (e.g. headcount ratio, income gap ratio, Gini index). Results show that regional schemes broaden the set of potential recipients and the coverage rate of national ones, while they only slightly increase the poverty reduction at the national level. Overall, the presence of complementary regional measures makes the national measure, the 'universal' *Reddito di Inclusione* (REI) closer to other European minimum income schemes (using France, Germany, and Spain as a benchmark) in terms of benefit adequacy. This provides evidence of the importance of taking into program complementarities and multi-level government interventions when evaluating the impact of national level policies.

Keywords: Minimum income schemes, Poverty, Inequality, Tax-benefit microsimulation.

JEL codes: D31, I32, I38.

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1. Introduction

The sudden increase of income inequality and poverty during the last decades has catalyzed policymakers' attention all around the world, in order to understand what are causes and consequences of increasing inequality and poverty, and most importantly which are the best policies to reduce their adverse effects. A number of scholars as well as Institutions, including the European Commission (Recommendation C(2008) 5737), have recently recognized the minimum income scheme (MIS) as one of the most important social policy to cope with poverty and social exclusion. These measures generally consist of a mix of a cash transfer alongside with a set of services (e.g. housing, training, job search) targeting households who are considered to be "mostly in need" under a financial or social point of view. The MIS aims at ensuring to the poor a minimum standard of living but also to help them to overcome the root causes of poverty, by activating working age people in terms of employment.

At the beginning of 2016, all 28 European Union countries have a MIS except for Italy and Greece (Frazer and Marlier, 2016). With serious delay compared to other European countries, Italy adopts its first national MIS ('*Sostegno per l'Inclusione Attiva*', SIA) in September 2016, while Greece does the same in February 2017 only (Ziomas et al., 2017).

European MISs have many common points. First, MISs are means-tested and universal measures, thus they do not only focus on specific categories of the population (e.g. elderly, disabled people, households with minors), but they represent an income support for the poor households as a whole. Second, most of MISs provide eligibility criteria regarding a minimum age and length of residence in the country, and also a committed adhesion to a project of social and employment activation (Busilacchi, 2013). At the opposite, European MISs tend to differ widely in their generosity and adequacy, as well as their low-income targeting (Cantillon et al., 2014; Frazer and Marlier, 2016).

Although a MIS should be uniform within the national territory, the Italian context has been characterized for a long time by a remarkable fragmentation of social cash transfers at the local level due to the absence of a national scheme. Moreover, both the several past faint attempts to introduce a national income support and the existing local MISs were often featured by temporariness essentially related to the political cycle and the uncertainty in the amount of resources available in the medium term (Spano et al., 2013). The SIA had indeed the objective to solve the local fragmentation of MISs in Italy, introducing a unique and permanent national measure.

Nonetheless, from the very moment of its adoption, the SIA had two important limitations: i) its very strict eligibility criteria left most of the poor households out; ii) its amounts did not represent an adequate support to ensure minimum standards of living. For these reasons, despite the SIA's uniformity objective, several Italian regions decided to introduce their own measures in the 2015-2017 period: Friuli-Venezia Giulia, Emilia-Romagna, Apulia, Sardinia, Aosta Valley, and Molise (Gallo, 2018). These regions have exploited resources coming from the European structural funds to finance the work activation policies linked to the MISs, while their cash transfers have been charged to the regional budgets.

Most of regional MISs show a perfect integration with the national measure, increasing the monthly amount or extending the eligible audience (or both). As for the latter, they preserved the SIA's eligibility criteria regarding the citizenship and the minimum length of residence (in this case, of course, in the regional territories), but they removed all the conditions related to the household composition (e.g. at least one disabled member or one minor), becoming truly universal like the European MISs. In addition, three regions (Sardinia, Friuli-Venezia Giulia, and Aosta Valley) raised the income threshold for access to the measures to broaden the eligible audience and improve targeting among the poor households.

This paper investigates to what extent the regional MISs jointly improve the effectiveness and the low-income targeting of the SIA national measure in 2017. Specifically, I want to estimate the overall potential audience of beneficiaries, the low-income targeting, and the joint effect in decreasing poverty and income inequality indicators (e.g. at-risk-of poverty rate, income gap, Gini index) of the analyzed national and regional MISs. The analysis is based on simulations relying on micro data from the European Union Statistics on Income and Living Conditions (EU-SILC) 2015 survey. Since the SIA was replaced by a new and more generous national MI scheme ('*Reddito di Inclusione*', REI) in January 2018, I will also evaluate how the overall effectiveness, adequacy and targeting of MISs operating in Italy may change in 2018. Baldini et al. (2018) already simulated the REI potential effects on poverty and income inequality using EU-SILC 2015 data. To the best of my knowledge, this is the first paper quantifying the complementary role of regional MISs in the implementation of national ones.

Finally, this study provides some insights on how much the conjunctions of national and regional MISs in Italy are far from the benefit adequacy characterizing the other European Union members using the MISSOC (*Mutual Information System on Social Protection*) 2018 database as a reference.

The remainder of the paper is organized as follows. Section 2 shows national and regional MISs operating in Italy during the 2017-2018 period. Section 3 discusses about data and methods for the microsimulation. Section 4 presents the results, and Section 5 concludes.

2. MISs operating in Italy in 2017-2018 period

A unique and continuous national measure to fight against poverty was missing in the Italian welfare system before 2016. Motivations of that rely on institutional, cultural, and political dynamics characterizing for a long time the country (Ferrera et al. 2012; Madama et al., 2018; Natili, 2019). Due to the absence of a national MIS, many both national and local policies were developed. At the national level, two specific measures need to be recalled: i) an experimental MIS at the national level ('*Reddito di Inserimento*') during the 1998-2003 period; ii) the *Social Card* since 2008, consisting of a two-monthly transfer of €80 (charged in an electronic payment card) for poor elderly and households with a child under three years old. As for the local level, several measures with different features and denominations started from 2004 to 2009 in five regions (Campania, Basilicata, Friuli-Venezia Giulia, Lazio, and Aosta Valley) and autonomous provinces of Trento and Bozen, as well as in numerous municipalities such as Milan (Spano et al., 2013). The local intervention emphasized the ability and determination of regional governments to cover somehow the neglect at the national level to introduce a MIS to contrast an important and growing phenomenon as the income poverty. However, this also led to a remarkable fragmentation of social cash transfers in Italy, which the SIA had the objective to solve in 2016.

2.1. National measures

The Law No 208/2015 introduced the '*Sostegno per l'Inclusione Attiva*' (or SIA) in September 2016, after a two-year MIS experimentation (called '*Nuova Carta Acquisti Sperimentale*') developed in the 12 Italian most populous municipalities during the 2014-2015 period. As a typical MIS, the eligibility to SIA depends on a means test on household income and the receipt of cash benefit is conditional on the social and employment activation of working age individuals. Nonetheless, in line with a well-known tradition in the Italian welfare system (Saraceno, 2006; Saraceno, 2016), SIA had categorical requirements that did not have an equivalent in other European MISs (Natili, 2019). In particular, poor households were eligible for SIA only in the presence of a minor child, a disabled child of any age, or a woman with a verified pregnancy status. The Italian citizenship did not represent a constraint for the SIA eligibility, given that all EU citizens could apply, as well as non-EU citizens with a long-term residence right. In any case, applicants had to result resident in Italy in the last two years at the moment of submission.

The means test related to the SIA eligibility did not focused on household income only but referred to the following criteria:

a) Household ISEE (Indicator of equivalised economic conditions considering both income and wealth)[1] lower than €3,000;
b) Total sum of cash transfers and other allowances already received by the household lower than €600 per month, raised to €900 in the presence of a non-self-sufficient household member;
c) No household member must have a car registered in the twelve months prior to the application, or with an engine capacity greater than 1300-CC, as well as motorcycles with an engine capacity greater than 250-CC, registered in the three years prior to the application;
d) No household member must be recipient of any type of unemployment allowance.

Beyond these criteria, applicants had to satisfy a multidimensional assessment of economic need, which took into account family burdens, the presence of children, and the economic and employment conditions of household members.[2]

Regarding the SIA cash transfer, it amounted to €80 per month for each household member until a maximum monthly transfer of €400 (plus €80 per month for single parent households). In case of the receipt of other measures for household income support (e.g. *Social Card*, family allowances), their sum had to be deducted from the SIA transfer. The consequent benefit was granted every two months and paid through an electronic payment card. The SIA receipt was 12-month long, but a second application was possible after a 6-month break.

The SIA showed up early two important limitations: i) its very strict eligibility criteria left most of the poor households out; ii) its amounts did not represent an adequate support to ensure minimum standards of living. To improve the national MIS, the Legislative Decree No 147/2017 introduced the

[1] The equivalence scale is equal to the number of household components raised to the power 0.65.

[2] The minimum score needed to satisfy the multidimensional assessment was equal to 45 at the SIA introduction. However, the Ministerial Decree of March 16, 2017 reduced it to 25 considering the previous minimum score too strict.

‘*Reddito di Inclusione*’ (or REI), which replaced the SIA starting from January 2018. The REI keeps a similar policy design to the SIA, thus a means-tested cash transfer conditioned to the social and employment activation of working age individuals living within the recipient household, as well as the SIA categorical and residence requirements.

As for the eligibility requirements related to the economic condition of households, referring to the afore-mentioned list of criteria, the REI abolishes the b) criterion of SIA and extends the a) one. Specifically, households must have an ISEE lower than €6,000 to apply for the REI. Nonetheless, a new criterion was introduced on the income component of the ISEE (the so-called ‘ISRE’), which must be lower than €3,000. Two eligibility criteria were also added regarding household housing and financial wealth, stating that applicants must have a housing wealth (excluding the main dwelling) lower than €20,000 and total financial assets lower than €10,000 (€8,000 for a couple of adults, and €6,000 for a single person). Finally, the d) criterion was confirmed, whereas the c) one was slightly changed: applicants for REI must not have a car registered in the two years prior to the application regardless the engine capacity (except for households having a disabled member) or any type of boat.

With respect to the SIA, the REI adopts a very different formula to calculate the amount of cash transfer. The annual benefit amount depends on the following formula:

$$\text{REI} = \alpha \times 3{,}000 \times (\text{No household members})^{0.65} - \text{ISER}$$

where α is a coefficient set to 0.75 for the year of introduction (i.e. 2018), and ‘*ISER*’ is the indicator of (not equivalised) economic conditions regarding the household income only. From this formula follows that the REI benefit does not depend on the number of household members only, but it takes into account the household income as well. Similarly to the SIA, however, the total sum of other means-tested cash transfers already received must be deducted from the REI amount. Considering a household with a null income and with no other cash transfers, the REI monthly amount is equal to €187.5 for a single person, €294.5 for a 2-member household, and so on until a maximum value of €539.82 for larger households. The REI benefit is granted every month and, more importantly, its length is extended to 18 months rather than 12. After a 6-month break, a new application can be submitted but for maximum 12 more months only.

The most important improvement of the national MIS, representing a significant novelty about the Italian welfare system as well, is the one determined by the Stability Law of 2018. In fact, that eliminates the categorical requirements to apply for the REI starting from July 2018 (i.e. the presence of a minor child, a disabled child of any age, or a pregnant woman within the household is not mandatory anymore to be eligible). This change makes the REI a “true” MIS, adopting the principle of “selective universalism” in line with most of European MISs (Raitano et al., 2018). For the sake of simplicity, I will refer to this version of REI as ‘Universal REI’.

2.2. Regional measures

Despite the SIA objective to uniform cash transfers for social assistance across the country, several Italian regions decided to introduce their own MISs from October 2015 to September 2017 to better cope with important limitations highlighted by the SIA (Gallo, 2018), before the REI introduction. They used regional budgets to financially cover cash transfers, whereas resources coming from the

European structural funds available to these regions financed work activation policies related to the MIS. Italian regions introduced own MISs are the following: i) Friuli-Venezia Giulia (*Misura Attiva di Sostegno al Reddito* or MIA); ii) Emilia-Romagna (*Reddito di Solidarietà* or RES); iii) Sardinia (*Reddito di Inclusione Sociale* or REIS); iv) Aosta Valley (*misure di Inclusione Attiva e di Sostegno al Reddito* or IASR); v) Apulia (*Reddito di Dignità* or RED); and vi) Molise (*Reddito Minimo di Cittadinanza* or RMC).[3] However in this analysis estimating the complementary role of regional MISs on the effectiveness and targeting of national ones in the 2017-2018 period, I focus on the first four MISs only. As for the Molise's MIS, it is not included in the analysis because it was abolished in February 2016, thus before the reference period of this study. Regarding the Apulia's MIS, it is strictly related to national MISs (e.g. same application form, similar policy design and eligibility criteria), but it does not neither improve their audiences nor increase their cash benefits, acting in fact as a further policy of work activation. Therefore, it has no expected effects on the performance of national MISs expect for their take-up at regional level.

Table 1 illustrates differences in eligibility criteria and cash benefit calculation between the four analyzed regional MISs and the SIA. The regional measures have overall similar policy design and aims to the national one but present some peculiarities. First, each region modified residence requirements providing that applicants had to result resident in the same in the last two years at the moment of submission. It is likely that was considered necessary to contrast the phenomenon of "welfare tourism". Second, all regions decided to abolish categorical requirements of the SIA, thus anticipating the future Universal REI, in order to make their MIS universal but selective. Only Aosta Valley keep a (although new) categorical requirement according to which applicants for IASR must be at least 25 years old (rather than 18). Third, the multidimensional assessment of economic need was removed among the eligibility criteria in all regional MISs, but changes to other economic requirements were more heterogeneous across regions. As an example, Friuli-Venezia Giulia, Sardinia, and Aosta valley regions extended, even if differently, the household ISEE threshold and the criterion regarding the total sum of cash transfers and other allowances already received by applicant households. As for the cash benefit calculation, other significant differences took place both between the SIA and regional MISs and across regions themselves, with the exception of Emilia-Romagna's RES which appeared equal to the SIA. Having higher monthly cash benefits, MIA, REIS, and IASR allowed the SIA receipt and eventually integrated the benefit up to their maximum values. Another interesting point to highlight is that, before the REI introduction, MIA and IASR outlined a cash transfer decreasing by household ISEE. Finally, the receipt length is equal to 12 months for all regional MISs but the IASR which is 8-month long at maximum.

In conclusion, I can state that the main objective of the RES consisted of increasing the audience of potential recipients of the national MIS, while the one of the MIA, REIS, and IASR was both to increase the audience and to enlarge the monthly cash benefit of the SIA.

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[3] Other Italian regions developed their own income support measures during the last years, such as Lombardy, Umbria, Lazio, and Basilicata. Nonetheless, eligibility criteria and objectives of these measures tend to be more similar to work activation policy rather than a MIS. Beyond the listed regions, Autonomous Province of Trento has its local MIS too, but I decided not to include that in this study since it was introduced in 2009 already and it is not associated to the analyzed national MISs.

Table 1 – Eligibility criteria and cash benefit calculation of the SIA and regional MISs in 2017

	SIA	MIA	RES	REIS	IASR
Residence requirement	Resident in Italy in the last two years	Resident in Friuli-Venezia Giulia in the last two years	Resident in Emilia-Romagna in the last two years	Resident in Sardinia in the last two years	Resident in Aosta Valley in the last two years
Categorical requirements	Presence of a minor child, a disabled child of any age, or a pregnant woman	None	None	None	Applicants must be at least 25 years old
Economic requirements	- a), b), c), and d) criteria reported in Section 2.1 (p. 4) - Multidimensional assessment of economic need	- Household ISEE lower than €6,000 - Total monthly sum of transfers lower than €600 for single persons, €750 for 2-member households, €900 for 3-member households or in case of a non-self-sufficient member, and €1050 for greater family sizes - c) and d) criteria reported in Section 2.1	- a), b), and d) criteria reported in Section 2.1	- Household ISEE lower than €5,000 - Total monthly sum of transfers lower than €800, and €900 in case of a non-self-sufficient household member - c) and d) criteria reported in Section 2.1	- Household ISEE lower than €6,000 - d) criterion reported in Section 2.1 - Not eligible for retirement, employed at least 365 days in the last five years, or unemployed during the last two years
Monthly cash benefit	€80 * No household members – income support measures already received (Max. €400) €80 more in case of single-parent households	X – received SIA benefit - income support measures already received (min. 40% of value without deductions) X = €400 for 0-€1000 ISEE; €360 for €1000-€2000 ISEE; €315 for €2000-€3000 ISEE; €235 for €3000-€4000 ISEE; €150 for €4000-€5000 ISEE; €70 for €5000-€6000 ISEE €100 more in case of one minor member; €150 more in case of two or more minors	€80 * No household members – income support measures already received (Max. €400) €80 more in case of single-parent households	€100 * (No household members + 1) – received SIA benefit (Max. €500)	X – received SIA benefit X = €550 for 0-€5,000 ISEE; €500 for €5,000-€5,500 ISEE; €450 for €5,500-€6,000 ISEE
Receipt length	12-month long + second application after a 6-month break	12-month long + second application after a 2-month break	12-month long + second application after a 6-month break	12-month long + second application after a 6-month break	5-month long + second application (for 3 months more only) after one-month break

Source: Gallo (2018).

The introduction of REI in January 2018 led regions to modify their own MISs in order to take into account novelties (e.g. more generous cash benefit, different eligibility criteria) highlighted by the new national measure. Friuli-Venezia Giulia, Emilia-Romagna, and Sardinia regions changed their MIS from November 2017 to June 2018, whereas Aosta Valley decided not to change the IASR accordingly. For simplicity, new regional MISs are labelled here as MIA2, RES2, and REIS2 respectively.

As illustrated in Table 2, the MIA2 embeds the previous MIA (and its features and eligibility criteria) and provides a monthly supplement to the REI cash benefits depending on the number of minors within the household. Similarly, the REIS2 keeps most of characteristics of the previous Sardinian measure but a threshold of household ISEE equals to the REI's one (i.e. €6,000) and provides a cash benefit increase for REI recipients depending on the household size. As for the Aosta Valley's MIS, the IASR was not changed after the REI introduction, whereas the Emilia-Romagna's one was totally revolutionized. While the previous RES abolished some eligibility criteria of the SIA to enlarge its audience of potential recipients, the RES2 just represents a significant supplement to the cash benefit of REI recipients being resident in Emilia-Romagna depending on the household size. Finally, MIA2 and RES2 extended their receipt length to 18 months as well as the REI, while REIS2 is only 6-month long now.[4]

Table 2 – Characteristics of regional MISs in 2018

	MIA2	RES2	REIS2	IASR
Categorical and economic requirements	The same of MIA	The same of Universal REI	The same of REIS except for a higher ISEE threshold (€6,000)	The same of IASR
Monthly cash benefit	The same of MIA	None	The same of REIS	The same of IASR
Monthly supplement to the REI cash benefit	€185 in case of no minor members; €235 in case of one minor; €285 in case of two or more minors	€110 * (No household members) ^ (0.65) (Max. €352)	€30 + €30 * No household members (Max. €150)	None

Looking at the relationship between national and regional MISs, three different scenarios during the 2017-2018 period may be defined as follows:

1. *Scenario 2017* or *SIA + regional measures (1)* – Support to the SIA by regional measures acting in 2017;
2. *Scenario 2018A* or *REI + regional measures (1)* – Support to the REI by regional measures acting in 2017 (i.e. before to be changed in line with the REI);
3. *Scenario 2018B* or *Universal REI + regional measures (2)* – Support to the Universal REI by regional measures acting in 2018.[5]

The analysis presented in Section 4 shows how the complementary role of regional measures varied accordingly to the national MIS changes taking advantage from this list of scenarios.

3. Data and methods

The aim of this paper consists of estimating the audience of potential recipients, the pro-poorness, and the joint effect in decreasing poverty and income inequality indicators of the analyzed national and regional MISs. To do that, I simulate the implementation of MISs though a static tax-benefit microsimulation model based on the *European Union Statistics on Income and Living Conditions*

[4] The Sardinia region left its municipality free to decide the REIS2 receipt length in a range between 6 and 9 months. However, most of municipalities (including Cagliari, the biggest city in Sardinia) chose to provide a 6-month long benefit.
[5] Actually, the MIA2 has been in charge also when the REI was not universal yet. However, its complementary role to the national measure is analyzed in this study on the universal REI only.

(EU-SILC) 2015 survey data.[6] This survey provides detailed micro-data on income, wealth, labour, and demographic and socio-economic characteristics at both individual and household level. The data set contains information for 42,987 individuals living in 17,985 households.

Income variables refer to 2014 (i.e. the year before the interview), but for this analysis they are inflation-adjusted to 2018 using consumer price indexes provided by Istat (i.e. the Italian national institute of statistics). Also, considering the well-known attitude of Italian households to misreport or underreport information about financial wealth (Cannari and D'Alessio, 1993; D'Alessio and Neri, 2015), I increase values of financial wealth so that the total amount deriving from the survey sample coincides with the population one at the national level provided by the Bank of Italy for the year 2016.[7]

To be clear, I assume a full take-up rate in the micro simulations despite it is a very rare condition. Policy Department A: Economic and Scientific Policy (2017) points out that in most European MISs the take-up rate is rather limited and it is almost complete only in countries such as Denmark and the Netherlands. As estimated by Bruckmeier et al. (2017) and the British Department for Work and Pensions (2017), MISs have a take-up rate of 60% in Germany and UK. Similarly, the take-up rate is 'incomplete' and equal to 40% when looking at the French *Revenu de Solidarité Active* (Domingo and Pucci, 2014).

As for poverty indicators, I focus first on the at-risk-of-poverty (AROP) rate. The AROP rate consists of a headcount ratio where the 60% of the national equivalised median income represents the income poverty threshold (more details in Social Protection Committee, 2015). Based on the same definition of poverty status, I also estimate the impact of national and regional MISs on both the income gap ratio and the Foster–Greer–Thorbecke (FGT) index with parameter $\alpha = 2$. Since the main objective of MISs operating in Italy is to contrast absolute poverty conditions, I further adopt in the simulations a more severe definition of poverty suing as threshold the 40% of the national equivalised median income rather than the 60% one. As regards the effects of national and regional MISs on income inequality, two different inequality indicators are considered: the Gini index and the Atkinson index with parameter $\varepsilon = 1$.

4. Results

4.1. Support to the audience of potential recipients

One first and important factor to analyze a MIS is the number of people it concerns. Table 3 shows the estimated audience of potential recipients for each of three national MISs introduced in the last years (i.e. the SIA, REI, and universal REI).

[6] I use the Italian component of the cross-sectional EU-SILC UDB 2015 – version 1 of December 2016.

[7] The financial wealth of households in the IT-SILC dataset is increased through a multiplier which depends on the decile income group and ranges between 3.1 and 6.4 (the underreporting attitude is positively related to the household income). Since I use multipliers to adapt survey information to the population ones, the number of households declaring a null financial wealth remains the same.

Table 3 – Audience of potential recipients of national MISs

Region	SIA		REI		Universal REI		Total	Total
	Individuals	**Households**	**Individuals**	**Households**	**Individuals**	**Households**	**inhabitants**	**households**
Piedmont	105,000	29,000	97,000	26,000	128,000	54,000	4,376,000	2,009,000
Aosta Valley	1,000	200	1,000	300	2,000	1,000	126,000	61,000
Liguria	36,000	12,000	34,000	12,000	48,000	23,000	1,557,000	770,000
Lombardy	221,000	62,000	249,000	66,000	311,000	114,000	10,036,000	4,460,000
Trentino-South Tyrol	6,000	1,000	12,000	3,000	12,000	3,000	1,068,000	457,000
Veneto	29,000	9,000	37,000	12,000	52,000	27,000	4,905,000	2,076,000
Friuli-Venezia Giulia	14,000	5,000	12,000	4,000	17,000	8,000	1,216,000	562,000
Emilia-Romagna	80,000	19,000	99,000	24,000	125,000	47,000	4,453,000	2,003,000
Tuscany	43,000	12,000	73,000	21,000	87,000	32,000	3,737,000	1,651,000
Umbria	47,000	13,000	40,000	11,000	43,000	13,000	885,000	385,000
Marche	34,000	11,000	33,000	10,000	42,000	16,000	1,532,000	647,000
Lazio	109,000	32,000	234,000	67,000	275,000	97,000	5,897,000	2,657,000
Abruzzo	41,000	10,000	10,000	4,000	30,000	20,000	1,315,000	559,000
Molise	2,000	1,000	3,000	1,000	8,000	3,000	308,000	131,000
Campania	369,000	90,000	368,000	92,000	503,000	165,000	5,827,000	2,179,000
Apulia	164,000	42,000	192,000	48,000	241,000	76,000	4,048,000	1,603,000
Basilicata	7,000	2,000	15,000	5,000	21,000	10,000	567,000	236,000
Calabria	69,000	20,000	76,000	23,000	99,000	44,000	1,957,000	805,000
Sicily	355,000	89,000	380,000	96,000	546,000	205,000	5,027,000	2,002,000
Sardinia	23,000	12,000	14,000	9,000	66,000	46,000	1,648,000	726,000
Italy	**1,758,000**	**470,000**	**1,982,000**	**534,000**	**2,659,000**	**1,007,000**	**60,484,000**	**25,979,000**

Table 4 – Support to the audiences of national MISs by regional measures

Region	SIA + regional measures (1)		REI + regional measures (1)		Universal REI + regional measures (2)	
	Individuals	**Households**	**Individuals**	**Households**	**Individuals**	**Households**
Aosta Valley	7,000	3,000	7,000	3,000	7,000	3,000
Friuli-Venezia Giulia	41,000	20,000	41,000	20,000	41,000	20,000
Emilia-Romagna	128,000	46,000	139,000	49,000	125,000	47,000
Sardinia	149,000	79,000	149,000	79,000	182,000	95,000
Italy	**1,966,000**	**583,000**	**2,193,000**	**648,000**	**2,806,000**	**1,071,000**

Increase rate of national MISs audiences (%)

Region	SIA + regional measures (1)		REI + regional measures (1)		Universal REI + regional measures (2)	
	Individuals	**Households**	**Individuals**	**Households**	**Individuals**	**Households**
Aosta Valley	*600%*	*1400%*	*600%*	*900%*	*250%*	*200%*
Friuli-Venezia Giulia	*193%*	*300%*	*242%*	*400%*	*141%*	*150%*
Emilia-Romagna	*60%*	*142%*	*40%*	*104%*	*0%*	*0%*
Sardinia	*548%*	*558%*	*964%*	*778%*	*176%*	*107%*
Total (only 4 regions)	***175%***	***309%***	***167%***	***305%***	***69%***	***62%***
Italy	***12%***	***24%***	***11%***	***21%***	***6%***	***6%***

About 470,000 households were potentially eligible for the SIA, for a total of 1.8 million of individuals. The change of national MIS to the REI slightly increased the audience of potential recipients, and it determined even a reduction of eligible households in some Italian regions: Abruzzo, Sardinia, Friuli-Venezia Giulia, Umbria, Piedmont, and Marche. At the opposite, the audience has doubled to about 1 million of households when the REI became universal (i.e. without categorical eligibility criteria). This estimate confirms results reported by Baldini et al. (2018), according to which 3.8% of Italian households should be eligible for the universal REI with a full take-up rate. Despite the significant growth of eligible households due to the universal REI, the number of individuals concerned by the last national MIS does not observe a proportional enlargement. It is likely that this happens because the universal REI refers more to single person households rather than households with one or more children.

In the audiences of all national MISs, Sicily and Campania regions are those reporting the biggest shares of potential recipients, composing together 35-40% of recipients in the country (Table 3). The Lombardy region follows the former two representing about 12% of the total number of potential recipients, although Lombard households cover 17% of Italian population of households in 2018. Also, given the definition of an eligibility threshold by income at the national level and the presence of an important North-South divide across Italy (Bertolini and Pagliacci, 2017), other Northern regions seem to be under-represented in terms of potential recipients of national MISs such as Veneto and Emilia-Romagna.

Table 4 illustrates the support to the audiences of national MISs provided by regional MISs presented in Section 2.2. Specifically, the four analyzed regional MISs determine a 24% and 21% greater audience of potential recipients (i.e. about 100 thousand households more) in case of the SIA and REI respectively, whereas their support is smaller and equals to +6% in the “Scenario 2018B”, thus the one with the universal REI and new regional MISs. The regional MIS having enlarged more the audience of the national scheme is the Aosta Valley’s one (i.e. the IASR) regardless the scenario. Beyond that, there is the Sardinian REIS and then the Friuli-Venezia Giulia’s MIA, even though the MIA2 seems to support more the universal REI audience of potential recipients (at least in terms of households) than the REIS2 does. Finally, the Emilia-Romagna’s RES doubled the audiences of both the SIA and REI, while the RES2 support to the universal REI audience is null for the afore-mentioned change of strategy at regional level.

4.2. Improvement of low-income targeting

Another fundamental factor on which focus on when assessing a MIS is its potential coverage of the poor, and thus its low-income targeting. To be clear, the low-income targeting is not here affected by the possible non-take-up since I assume a take-up rate equals to 100% for all MISs operating in Italy. Therefore, evidences pointed out in this Section only regards the strictness of MISs eligibility criteria – both categorical requirements and those criteria related to household living conditions – with respect to characteristics of the poor population in Italy as a whole.

To evaluate the low-income targeting of national and regional MISs, I focus here on two indicators: the coverage rate and the false positive rate. The first rate, as defined by Figari et al. (2013), is defined as the sum of individuals who are entitled to a MIS and poor, divided by the total population in a poverty status. The second rate instead consists of the ratio between the sum of individuals who are entitled to a MIS despite not poor (i.e. the so called 'false positives') and the total number of eligible individuals. In other words, the coverage rate should provide some information about the share of the poor who are excluded from receipt because of chosen eligibility criteria of MISs, whereas the false positive rate should indicate how much MISs benefit goes to the non-target population.

Referring to the standard AROP threshold (60% of the national median), Table 5 shows that the SIA and REI only covered 9% and 10% of the Italian poor respectively. The coverage rate is much higher in the case of the universal REI (19%) due to the fact that it concerns categories of the poor before excluded from national MISs such as single person households and the elderly. In the three analyzed scenarios regional MISs always significantly improve the coverage rate of national measures. The coverage rate goes even up to 20% when the conjunction of the universal REI and regional measures introduced in 2018 is considered, but this scenario is also the one reporting the lowest improvement in the low-income targeting of the national MIS.

Table 5 – Coverage and false positive rates by MIS and poverty status

AROP status at 60% of median						
Measure	**Not entitled to MIS, poor**	**Entitled to MIS, poor**	**Entitled to MIS, not poor**	**Not entitled to MIS, not poor**	**Coverage rate**	**False positive rate**
	(A)	**(B)**	**(C)**	**(D)**	**(B / (A+B))**	**(C / (B+C))**
SIA	17.81	1.76	0.05	80.37	*9.0%*	*2.8%*
SIA + regional measures (1)	17.42	2.16	0.09	80.34	*11.0%*	*3.8%*
REI	17.54	2.04	0.02	80.41	*10.4%*	*0.9%*
REI + regional measures (1)	17.13	2.44	0.05	80.37	*12.5%*	*2.1%*
Universal REI	15.79	3.79	0.09	80.34	*19.3%*	*2.3%*
Universal REI + regional measures (2)	15.58	4.00	0.13	80.30	*20.4%*	*3.0%*
AROP status at 40% of median						
Measure	**Not entitled to MIS, poor**	**Entitled to MIS, poor**	**Entitled to MIS, not poor**	**Not entitled to MIS, not poor**	**Coverage rate**	**False positive rate**
	(A)	**(B)**	**(C)**	**(D)**	**(B / (A+B))**	**(C / (B+C))**
SIA	7.08	1.50	0.32	91.11	*17.4%*	*17.4%*
SIA + regional measures (1)	6.80	1.78	0.47	90.96	*20.7%*	*20.8%*
REI	6.75	1.83	0.22	91.20	*21.3%*	*10.9%*
REI + regional measures (1)	6.46	2.12	0.38	91.04	*24.7%*	*15.2%*
Universal REI	5.12	3.46	0.42	91.01	*40.3%*	*10.7%*
Universal REI + regional measures (2)	4.98	3.60	0.52	90.90	*41.9%*	*12.7%*

As for the false positive rate, it is quite small and stable among MISs considering that this rate remains below 4% in all analyzed cases. The change of national MIS from SIA to REI led to a reduction of the false positive rate, but it grows again with the universal REI. Similarly to the coverage rate, regional MISs always determine an increase of the false positive rate. Although this effect of regional MISs may appear as undesirable, it is probably associated with the fact that some regions – especially those from the richer North of Italy – implicitly refer to a higher poverty threshold with respect to the national one.

When the more severe definition of AROP is considered (i.e. poverty threshold equals to 40% of the national median), results remain overall the same except for greater values of both the coverage rate and the false positive one (Table 5). According to this poverty definition, the SIA potentially covered about 17% of the total population in poverty, while more than 40% of the Italian poor are entitled for the universal REI. In the latter case, the coverage rate goes from 40% to 42% when regional MIS are taken into account, but the biggest improvements in the low-income targeting of national measures are reported in the "Scenario 2017" and the "Scenario 2018A". As expected, false positive rates are also higher in the bottom panel of Table 5 because using a severe poverty status increases – *ceteris paribus* – the probability to consider as false positive an individual entitled to a MIS, particularly to the regional ones.

4.3. Joint effect against poverty and income inequality

Through a static tax-benefit microsimulation model, I simulate here the implementation of national and regional MISs with a 100% take-up rate. MISs are generally composed by both a cash transfer and a 'household project' for the social and employment activation of working age members. The latter aims to seek and find a job for MIS recipients trying to solve the condition of economic distress and thus to help households to transit out of poverty. In this analysis I do not simulate potential effects of that MIS component on poverty and income inequality reduction, but I focus on the cash transfer ones only. Figure 1 shows estimated effects of national MISs alone and joint with regional MISs on three poverty indicators (i.e. headcount ratio, income gap ratio, and FGT index with $\alpha = 2$) and two income inequality indicators (i.e. Gini index and Atkinson index with $\varepsilon = 1$).

Figure 1 – Effects of national and regional MISs on poverty and income inequality indicators

Figure 1 highlights that the national MISs always determine a significant reduction of poverty in Italy. Their impact is particularly strong when looking at the FGT index and the income gap ratio respect to the headcount ratio and, as expected, it is greater if a more severe poverty status (i.e. AROP threshold at 40% of the national median rather than 60%) is considered. The lower effect on the poverty incidence is likely to be related to the small amounts of cash benefit, which were rarely enough to overpass the poverty threshold. At the opposite, national MISs appear effective in making the poor recipients “less poor”, and thus reducing the distance between their household income and the relative poverty threshold. Moreover, the simulated effects on headcount ratio do not change among national MISs, while the universal REI clearly has the greatest impact on the poverty intensity. Finally, national MISs do not underscore any significant effect on income inequality indicators except for a slight decrease of the Atkinson index.

As for the support of regional MISs to the national ones, the joint effects of the three analyzed scenarios on poverty and income inequality indicators never significantly differ from the ones reported by the single national MISs (Table 5). However, these results may be associated to the fact that they refer to the whole country, despite regional MISs concern four regions out of twenty only. For this reason, joint effects of national and regional MISs on poverty and income inequality indicators are reported in Table 6 for the four Italian regions separately.

Table 6 – Joint effects (as % var.) of MISs on poverty and income inequality indicators at regional level

Region	Scenario	AROP status at 60% of median			AROP status at 40% of median			Gini index	Atkinson index (ε=1)
		Headcount ratio	Income gap ratio	FGT index (α=2)	Headcount ratio	Income gap ratio	FGT index (a=2)		
Aosta Valley	Baseline	7.05	41.74	1.71	5.49	25.33	1.02	26.27	11.68
	2017	*-13%*	*-34%*	*-42%*	*-82%*	*202%*	*-16%*	*-3%*	*-10%*
	2018B	*-13%*	*-38%*	*-43%*	*-82%*	*202%*	*-16%*	*-3%*	*-10%*
Friuli-Venezia Giulia	Baseline	10.91	26.76	1.68	3.14	50.16	1.09	25.85	11.48
	2017	*-16%*	*8%*	*-8%*	*-2%*	*-5%*	*-9%*	*0%*	*1%*
	2018B	*-13%*	*1%*	*-17%*	*-3%*	*-15%*	*-27%*	*0%*	*-2%*
Emilia-Romagna	Baseline	9.70	35.99	2.09	4.05	47.92	1.36	29.39	14.93
	2017	*-9%*	*-5%*	*-18%*	*-8%*	*-11%*	*-24%*	*0%*	*-1%*
	2018B	*-34%*	*-23%*	*-59%*	*-46%*	*-26%*	*-71%*	*-6%*	*-13%*
Sardinia	Baseline	25.54	40.63	7.23	11.01	58.64	5.82	30.87	16.49
	2017	*-13%*	*-12%*	*-34%*	*-11%*	*-30%*	*-44%*	*0%*	*-5%*
	2018B	*-8%*	*-13%*	*-30%*	*-4%*	*-29%*	*-41%*	*1%*	*0%*

In the Scenario 2017, the conjunction of the SIA and the Aosta Valley’s IASR is the one with the best effects on poverty if the standard AROP definition is adopted. When referring to the severe definition of poverty, the IASR-SIA keeps the best performances on the headcount ratio only, while the combination Sardinian REIS-SIA reports the greatest joint effects on the income gap ratio and the FGT index.[9] After the introduction of the universal REI and the consequent change of regional MISs (i.e. Scenario 2018B), the Emilia-Romagna’s RES2 overall represents the regional MIS improving the most effects of the national measure on poverty, whereas the Friuli-Venezia Giulia’s MIA2 shows

[9] In this case, the conjunction of the national MIS and the IASR even determines an important increase of the income gap ratio, and thus the poverty intensity in Aosta Valley. That is probably due to the fact that the SIA and the IASR jointly allow to transit out of poverty the poor having household incomes closer to the poverty threshold at 40% of the median, whereas the poorest among poor households were excluded from the receipt for some reason. Nonetheless, the survey sample contains only 715 observations for Aosta Valley, so that separate estimates for this region only may suffer of some unreliability.

the lowest joint effects. Similarly to results illustrated in Figure 1, Table 6 highlights limited joint effects on the income inequality indicators. In particular, effects on the Gini index are overall null regardless the regional MIS and the scenario observed, whereas only the IASR and the RES2 turn out to reduce (jointly with the universal REI) the Atkinson index by more than 10 percentage points.

4.4. A comparison with European MISs in terms of benefit adequacy

In this last Section, I finally present a comparison between Italian MISs operating in 2018 and some European MIS in terms of benefit adequacy. The aim of this analysis is to point out how far cash benefits characterizing the universal REI and conjunctions with regional MISs are still from ones of other European countries MISs. In particular, I consider three European countries: France and Germany, as representative countries of the Continental welfare system; and Spain, as further country (as well as Italy) belonging to the Mediterranean welfare system (Whelan and Maître, 2010). As usual in this type of analysis, I firstly report monthly benefit amounts of European and Italian MISs by some household types in Table 7. The main source of benefit amounts for the three European countries is the MISSOC (*Mutual Information System on Social Protection*) 2018 database[10], while those for Italy (i.e. the universal REI) and its regions (i.e. conjunctions of the universal REI and regional MISs) rely on information reported in Section 2 of this paper.

Table 7 – Monthly benefit amounts of European and Italian MISs by household size

Country / MIS	Single person	Single parent with		Couple with			
		1 minor	2 minors	No minors	1 minor	2 minors	3 minors
France	551	943	1179	826	992	1157	1377
Germany	416	712	1008	790	1086	1382	1622
Spain	400	513	588	513	588	663	735
Italy (universal REI)	188	294	383	294	383	462	534
Univ. REI + MIA2	373	529	668	479	618	747	819
Univ. REI + RES2	298	467	608	467	608	733	847
Univ. REI + REIS2	248	384	503	384	503	612	714
Univ. REI + IASR	550	550	550	550	550	550	550

Sources: MISSOC 2018 database and OECD (2018).

With respect to the universal REI, Table 7 shows that French, German, and Spanish MISs have much higher monthly benefit amounts. The distance of the Italian MIS is particularly strong from the French one as regards single persons, and from the German one as regards households with many members. Monthly benefit amounts of the universal REI appears more similar to the ones provided by the Spanish MIS, although the basic benefit for single persons is the half in Italy.

Regional MISs increase a lot monthly benefit amounts of the universal REI, making the joint MIS closer to the other European measures. The conjunction of the universal REI and the Aosta Valley's IASR has a benefit for single persons very high and even in line with the French one, but it does not

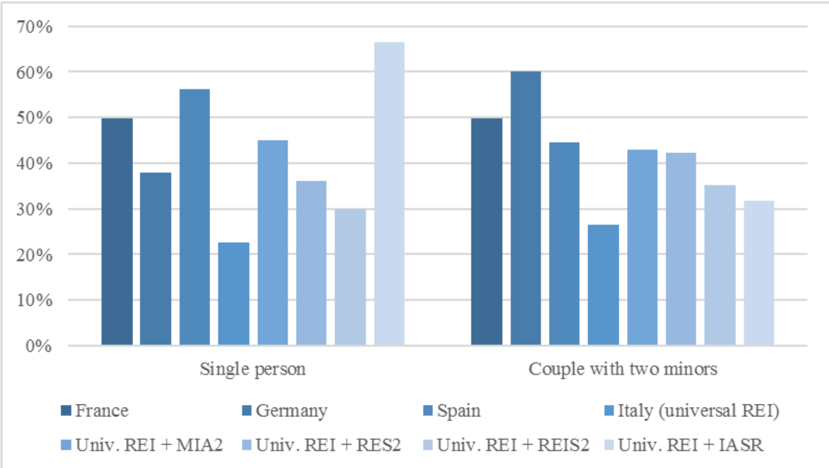
[10] MISSOC database updated at the July 1, 2018. Link: https://www.missoc.org/missoc-database/comparative-tables/.

vary according to the household size and thus becoming more and more inadequate for large households. At the opposite, supplements to the universal REI by both the MIA2 and the RES2 already lead to two joint MISs having higher benefit amounts for households with one or more minors. The lowest support to the universal REI in terms of benefit amounts increase is instead the one provided by the Sardinian REIS2, despite it also makes closer the national MIS to the Spanish one.

The three European countries and Italy, however, have different purchasing powers and income levels, so that a simple comparison of monthly benefit amounts is not enough to offer a correct assessment of the benefit adequacy of their MISs. Similarly to Natili (2019), I therefore evaluate the benefit adequacy (or generosity) through the ratio between the monthly benefit amount and the standard AROP threshold for single persons and couples with two minors.

Even though the French MIS has a €151-higher amount and the German one has a €16-higher amount as well, the Spanish MIS reports the highest benefit adequacy for single persons among European countries (Figure 2). This evidences depends on the fact that, as expected, the AROP threshold for single persons in 2017 is much lower in Spain (€8,522) than in France or Germany (€13,246 and €13,152 respectively). Also the Italian AROP threshold is low for single persons (€9,925), but the universal REI however remains the MIS with the lowest benefit adequacy.

Figure 2 – Benefit adequacy of European and Italian MISs by household size



Note: AROP thresholds at the year 2017. Source: Elaborations of the author based on the Eurostat online database.

Figure 2 points out that the conjunction of the universal REI and regional MISs operating in 2018 clearly improves the benefit adequacy of the national MIS for single persons, especially when supplements by the Friuli-Venezia Giulia's MIA2 and the IASR are considered. In the latter case, the joint MIS even highlights the highest benefit adequacy among European MISs.

Conclusions about the benefit adequacy of European and Italian MISs pretty change referring to bigger households and, in particular, to couples with two minors. In this case, the German and French MISs show in fact the best benefit adequacy, followed by the Spanish MIS and (much farther) the universal REI. As for the complementary role of regional MISs to the national MIS, the IASR determines now the lowest increase in the benefit adequacy of the universal REI. Conversely, joint

MISs with both the MIA2 and the RES2 lead the universal REI to a similar benefit adequacy with respect to the Spanish MIS.

5. Conclusions

With serious delay compared to all European countries (excluding Greece only), a unique and continuous national measure to fight against poverty was missing in the Italian welfare system before 2016 (Frazer and Marlier, 2016). The introduction of the SIA in September 2016 tried to solve this lack, as well as the remarkable fragmentation of cash transfers for social assistance across Italy. From that, other two national MISs where introduced in 2017-2018 period (i.e. REI and universal REI) with the constant aim to improve the audience of recipients, benefit generosity and effectiveness of the previous one. In particular, the universal REI represented a significant novelty about the Italian welfare system, since it eliminates the categorical requirements to apply for the REI. The universal REI adopts the principle of "selective universalism" common to most of European MISs (Raitano et al., 2018).

Despite the SIA objective consisted of reducing the territorial fragmentation of cash transfers in Italy, and thus fighting the inequality of income support at the national level, several regions however decided to make their own MISs to better cope with important limitations highlighted by the SIA itself. Considering the typical features of a MIS, in this study I focus on the schemes introduced by Friuli-Venezia Giulia (*Misura Attiva di Sostegno al Reddito* or MIA), Emilia-Romagna (*Reddito di Solidarietà* or RES), Sardinia (*Reddito di Inclusione Sociale* or REIS), and Aosta Valley (*misure di Inclusione Attiva e di Sostegno al Reddito* or IASR), but other Italian regions developed similar measures and policies of work activation too during the reference period (e.g. Apulia, Molise, Lombardy).

Through a static tax-benefit microsimulation model based on the EU-SILC 2015 survey data, this paper wants to highlight the complementary role of regional MISs in the overall audience of potential recipients, the low-income targeting, and the effect in decreasing poverty and income inequality of the national MISs. Although the regional initiative has been in contrast with the initial aim of the SIA, estimation results show that regional MISs significantly improved the low-income targeting of the three different national schemes. The four analyzed regional MISs determine a greater audience of potential recipients of national measures (even 24% more in case of the SIA). Moreover, they improve the coverage of the poor population in Italy provided by national MISs, reaching 42% of people in severe AROP status when considering together the universal REI and regional MISs operating in 2018. At the opposite, regional MISs lead only to a slight increase of the poverty reduction at country level, since the joint effects with national schemes on poverty and income inequality indicators never significantly differ from the ones reported by the single national MISs. Specifically, assuming a full take-up rate, all the three national MISs determine a statistically significant decrease of poverty in terms of both incidence and intensity (especially the universal REI in the latter case), no significant effects are revealed by the income inequality measures. Making a comparison with three European MISs (i.e. the French, the German, and the Spanish ones), results also show that regions introduced their own MISs make the benefit adequacy of the universal REI in their territories closer (and sometime higher) to European standards. In conclusion, this analysis provides evidence of the importance of taking into program complementarities and multi-level government interventions when evaluating the impact of national level policies.

Due to the change of lead in the Italian government in the middle of 2018, the universal REI has been replaced in March 2019 by the *Reddito di Cittadinanza* (or Citizenship Income). Therefore, that is going to be the fourth change of national MIS in the last four years. The Citizenship Income should double the audience of potential recipients of the universal REI and have a much more generous cash benefit with respect to the previous national scheme (Gallo and Sacchi, 2019). In front of this change, Italian regions have not already established how to modify their own MISs except for Friuli-Venezia Giulia, which further enlarges the MIA audience of potential recipients but does not increase the monthly benefit amount.

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