

# Explaining Italian “exceptionalism” & its end: minimum income from neglect to hyper-politicization

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## **Abstract:**

Traditionally at the margins of the political debate, minimum income protection has recently become a key issue in Italian politics. After decades of social and political ‘neglect’ letting Italy the only European country (with Greece) still lacking an anti-poverty minimum income safety net in the 2010s, finally a national programme called Inclusion Income was introduced in 2018, then replaced by a more robustly financed scheme, the Citizenship Income in 2019. The introduction of these new programs was the object of an intense political debate, which raises two main puzzles. Why a policy field characterized by the low political resources of would be beneficiaries and low incidence on the overall welfare budget has become so important in the political debate? How did it occur in Italy, where minimum income protection had been absent in political discourses for at least five decades after World War II? To answer these questions, this article first elaborate a novel theoretical framework which combines the main properties of socio-political demand and political supply in order to explaining the scope and direction of minimum income reforms. Second, it provides an analytically oriented reconstruction of MIS policy trajectory in Italy in the three different phases: the phase of MIS ‘neglect’ (1948–1992) characterized by *inertia*; the period of political ‘contentiousness’ (1993–2012), marked by attempts of *path departure* followed by *policy reversals*; the more recent phase leading to the *introduction and institutionalization* of a MIS. Third, the article provides a theoretically framed interpretation of the overall MIS trajectory in Italy.

**Keywords:** Italian welfare state – minimum income – interest groups – party politics

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**Explaining Italian “exceptionalism” & its end:  
minimum income from neglect to hyper-politicization**

## **1. Introduction**

In the field of minimum income protection Italy indeed represents an exceptional case in comparative perspective for two main reasons. First, it was the last EU-28 country introducing a last-resort safety net for working-age individuals in the form a fully-fledged minimum income scheme (MIS)<sup>1</sup> in 2018, whereas in the previous seven decades (1946–2017) a national anti-poverty programme had always lacked - despite the high level of overall social protection expenditure. Second, the “Italian exceptionalism” relates to the peculiar policy trajectory leading to such policy outcome: in fact, the long lasting absence of MIS in the Italian welfare state was due to neither political inertia nor institutional resilience, but rather the result of an inconsistent policy trajectory, with several attempts of path departure soon followed by policy reversals - both at the national and the regional level (Jessoula et al. 2014, Natili 2019).

However, after decades of social and political ‘neglect’ letting Italy the only European country (with Greece) still lacking an anti-poverty minimum income safety net in the 2010s, between 2014 and 2017 several pilot programs were implemented, finally leading to the introduction of a national non-contributory, means-tested Minimum Income Scheme (MIS) - called Inclusion Income (REI) - in 2018, then replaced by a much more robust scheme in 2019 – the so called Citizenship Income (RdC). Therefore, traditionally at the margins of the political debate, minimum income protection has become a key issue in Italian politics and the introduction of these new programs was the object of intense political debate.

This raises two main puzzles. Why a policy field characterized by the low political resources of would be beneficiaries and low incidence on the overall welfare budget has become so important in the

political debate? How, and why, did it occur in Italy, where minimum income protection had been almost absent in political discourses and party programs for at least five decades after World War II?

Indeed, the comparative welfare state literature has recently shown particular interest in understanding the reasons behind Italian exceptionalism. Scholars have aimed to identify the factors behind the lack of a minimum income scheme in the traditional Italian welfare state configuration (Sacchi and Bastagli 2005, Saraceno 2006), as well as why in the so-called ‘recalibration’ phase (1992-2013) minimum income schemes were introduced and then almost immediately repealed (Jessoula et al. 2014, Kevins 2015, Lalioti 2016, Natili 2018); finally, why, more recently, minimum income schemes have reached the very centre of the political debate (Gori 2020, Natili 2019, Sacchi 2018, Vesan and Ronchi 2019).

Although very rich and useful, these contributions do not add up, however, to a unitary interpretative framework which might allow a comprehensive interpretation of both the overall minimum income policy trajectory since the establishment of the Italian First Republic in 1946 and underpinning political dynamics. This paper therefore aims to fill this gap by focusing on three main periods: the phase of MIS ‘neglect’ (1948–1992) characterized by *inertia* in this policy field; the period of political ‘contentiousness’ (1993–2012), marked by attempts of *path departure* – with the introduction of pilot minimum income schemes – peculiarly followed by *policy reversals*; the more recent phase shaped by competitive “credit claiming” dynamics around the *introduction*, subsequent *expansion and institutionalization*, of a MIS in the Italian welfare state architecture.

It does so by, first, further elaborating a novel theoretical framework which combines the main properties of socio-political *demand* – i.e. interest groups and voters – political *supply* – i.e. parties and party system – in order to explaining the scope and direction of minimum income reforms (Natili 2019). Second, it provides an analytically oriented reconstruction of MIS policy trajectory in Italy in

the three different phases outlined above. Third, the article provides a theoretically framed interpretation of the overall MIS trajectory in Italy, subsequently concluding with some reflections on the implications of the analysis for the politics of minimum income.

Methodologically, the empirical analysis presented in this article relies on detailed *process tracing* of policy reforms trajectory in a single case study. This method is considered particularly suited for theory building, that is to unveil and specify the causal mechanisms, the sequencing of events that link possible causes and observed outcomes in a particular historical context (Trampusch and Palier, 2016). This strategy does not allow for generalizations that go beyond the Italian case, but it allows formulating new hypotheses on the, still under-theorized, political dimension of minimum income schemes.

## **2. The Politics of Minimum Income in Italy. In search for a 'unitary' theoretical framework**

The comparative social policy literature has identified a number of institutional factors ("barriers") that contributed to explain the absence of a minimum income scheme in traditional Southern European welfare states (for a summary, see Ferrera 2005). However, in the last two decades, divergent trajectories in Southern Europe countries led scholars to investigate what factors helped overcoming these institutional barriers (Kevins 2015, Lalioti 2016, Natili 2018, 2019). Although a comprehensive explanation is still missing, two main arguments can be found in the literature.

Some scholars focused on the 'demand' side of political competition, emphasizing the limited support towards anti-poverty programs among the electorate and/or interest groups. Kevins (2015), in particular, argues that the Italian inaction in the field of minimum income protection was the result of neither institutional nor partisan factors, but rather due to the low level of public pressure. Unfortunately, however, there are no reliable data on the evolution of public support towards public minimum income schemes in Italy to test systematically this hypothesis<sup>2</sup>. Moreover, it should be

emphasized that, due to the absence of reciprocity (i.e. the asymmetry between contributors and beneficiaries which is typical of MIS) and the limited political resources of beneficiaries<sup>3</sup>, public support for social assistance targeted benefits tends to be significantly lower than for social insurance and/or universal benefits (Clegg 2013, Moene and Wallerstein 2001), at least if the former are not supported by (powerful) interest groups able to 'frame' the public discourse differently. For these reasons, other scholars looked at the positions of relevant interest groups. Saraceno (2006) suggested that, in Italy, the focus should be posed on the limited trade unions' interest in MIS. Consistently, other scholars have emphasized that the weak support by key social actors – religious organizations and trade unions primarily – constrained (also leftist) governments' interest in introducing a MIS in Italy since, under these conditions, the chances to "claim credit" are very limited (Laloti 2016, Natili 2018).

While contributing to explain the absence of *path departure and/or institutionalization* of MIS in Italy, the studies centred on socio-political demand do not allow to understand *policy reversals*, which represent a peculiarity of the Italian policy trajectory: thus, the question why, between the mid-1990s and 2013, the introduction of MISs - both at the national and at subnational level - was followed by rapid dismantlement of established programs remains unanswered. In order to explain this outcome effectively, scholars have therefore turned to the properties of the party system (Jessoula et al. 2014, Natili 2019). These studies outlined the specific role of right wing parties in Italy, which – differently from any other European country – have acted as veto players, never promoting the introduction of these policies and immediately repealing programs introduced by centre-left governments. The explanation of such Italian 'exceptionalism' therefore focuses on the peculiar nature of the Italian multi-party system during the Second Republic (1993-), allowing the 'political activation' of two additional cleavages - beyond the traditional left-right dimension - which are more salient for the politics of social assistance than in other social policy domains: these two

cleavages are the “State vs Church” and the “Centre vs Periphery”, respectively related to “horizontal” and “vertical” subsidiarity principles. Along the State-Church divide, ‘parties of religious defense’ (Manow and van Kersbergen 2009) in Italy have permanently opposed a public, right-based, MIS in order to preserve both traditional poor-relief measures provided by charities and traditional family values. As regards the Centre-Periphery cleavage, the presence of regionalist parties greatly reduced the political viability of national anti-poverty schemes, since harsh territorial (re)distributive conflicts aroused around MIS due to the high concentration of the poor in the Southern regions (Jessoula et al. 2014).

Beyond the dimensionality of the party system, also the ‘direction’ of party competition contributes to explain trajectories of welfare reforms (Ferrera et al. 2012, Picot 2012), and in particular minimum income reforms in Italy. Anti-poverty benefits may prompt conflicts and competition not only along the traditional left-right dimension but also within the two traditional political camps (Bonoli 2013) where “credit claiming” dynamics may ultimately result in very different policy outcomes. In fact, the emergence of a new left wing party competing for outsiders’ votes may, on the one hand, constitute a key mechanism leading to the expansion of social policy benefits to previously neglected social groups (Garay 2016). On the other, (radical) right parties may find it convenient campaigning *against* these benefits in order to differentiate their proposals from other right parties, emphasizing their opposition against migrants who generally constitute an important share of MIS beneficiaries (Natili 2018). Thus, competition within the right camp may be particularly detrimental to the expansion of minimum income schemes.

The focus on party system properties and competitive dynamics therefore greatly contributes to our understanding of policy reversals in Italy, but it is much less effective in explaining both policy inertia and path departure. Hence, we claim that, in order to fully grasp the scope and direction of minimum income reforms, it is necessary to look at both socio-political ‘*demand*’ – i.e. interest

groups and voters - *and* political ‘supply’ – political parties and the structure of the party system – as well as to elaborate on how these interact (see also Bulfone and Tassinari 2018). The interplay between socio political demand and political supply actually determines the conditions for the emergence of distinct policy-making patterns, with subsequent peculiar policy outputs. Thus, even though policy changes are moulded by a set of intervening factors (Mahoney 2000) - including functional pressures, the institutional configuration of the welfare state, the labour market context, the diffusion of policy models, the internal configuration of the various pressure groups and their decisional procedures as well - that make it impossible to pre-determine mechanically the outcome of a policy making process, it is possible to identify some plausible mechanisms – to be then tested empirically – leading to different types of minimum income reforms.

To do so, we build on a theoretical framework introduced elsewhere (Natili 2019) to formulate our main hypotheses. With regard to socio-political demand, we distinguish three different conditions: i) ‘latent’ demand, when no relevant interest group claims for the introduction of a MIS; ii) ‘weak’ demand, when the important interest groups in the policy field<sup>4</sup> are divided on the issue of minimum income protection; iii) ‘strong’ demand, that is, when all main groups support the introduction of a MIS. As for political offer, the Italian party system, despite frequent transformations from the First to the Second Republic and the current times, has been persistently characterized by both multiple cleavages - beyond the traditional left-right dimension - and the presence of within camp(s) – or pole(s) - competition (Ferrera et al. 2012; Picot 2012). This is why here we formulate the hypotheses considering the case of “fragmented pluralism” only<sup>5</sup>.

Against such backdrop, the first hypothesis is that the presence of (at least) an interest group campaigning for minimum income reforms is *a necessary condition* for the introduction and/or institutionalization of MIS. In fact, given the low political resources of potential beneficiaries, socio-political demand needs to be aggregated and articulated by interest groups in order to prompt

claiming credit strategies by political actors – this, at least, in advanced economies where the share of people in poverty is relatively limited and, thus, politically unprofitable<sup>6</sup>. Therefore, when socio-political demand remains *latent*, it is very likely that policy inertia prevails.

By contrast, when political demand is *weak* – that is when social actors are divided, some of them supporting MIS whereas others are against - partisanship becomes more relevant and policy trajectories are likely to become inconsistent - since governments of different colours may search for political support among diverse social constituencies, and groups, by elaborating different strategies to tackle poverty. Accordingly, our second hypothesis is that, under these conditions, centre-left governments would support the introduction/institutionalization of MIS whereas centre-right cabinets aim for inertia/removal. This is because competition within left-wing parties increases the bargaining potential of even residual or less relevant social actors (i.e. social movements and/or NGOs). Conversely, competition within the right may induce confessional (Christian-democratic) and/or radical right parties to oppose MIS in order to claim credit and gain support both/either among groups opposing this type of social policy program and/or specific segments of the electorate, counting on the fact that no strong mobilization of beneficiaries and/or social groups would occur.

Radically different dynamics emerge when socio-political demand is *strong*: in the case of a united pro-MIS front, the political incentives to introduce minimum income schemes are actually much stronger since governments may claim and gain credit among several powerful social groups. In this condition, we hypothesize that path departure and/or expansion are likely to occur when centre-left governments are in power, whereas retrenchment - but not policy reversal - may be expected under centre-right rule. In fact, competitive dynamics within the left coupled with a strong demand should ensure that leftist governments strengthen these benefits. Conversely, the presence of a strong demand should prevent competition within the right camp from leading to a full abrogation

of minimum income benefits. Moreover, the stronger the competition within the right – and, thus, the relevance of niche radical-right competitors - the higher the probability that retrenchment reforms - including tightening of eligibility requirements and/or reduction of benefit generosity for certain social groups - will be introduced. In the following, we test whether these mechanisms contribute to explaining MIS policy developments in Italy since the transition to democratic rule in 1946-48 until the establishment of the first national MIS in 2018.

### **3. The First Republic (1948-92): ‘neglect’ of a last-resort safety net**

#### *3.1 The latent socio-political demand for MIS*

During the First Republic, in Italy, claims to strengthen social protection measures for labour market outsiders were weak in the socio-political arena. For long time, charities and organizations working at the field level have been scarcely active and not effective in pushing the topic on the political agenda (Gori 2020) – also because in this phase the Catholic Church generally opposed public intervention in the anti-poverty field (Madama 2010). As for social partners, trade unions have traditionally supported the introduction and subsequent expansion of contributory social insurance schemes targeted to employees, rather than sponsoring minimum income benefits (Ferrera et al. 2012). In fact, the fear that a national anti-poverty scheme might constrain the existing (largely pro-insider) income protection system – and especially the Wage Supplementation Funds (*Casse Integrazione Guadagni*) – contributed to trade unions’ “suspicion” toward a comprehensive anti-poverty program. Therefore, the introduction of MIS could not rely on strong advocates among societal actors, and socio-political demand remained only *latent* for more than four decades.

#### *3.2 A polarized pluralist party system*

The presence of a particularly harsh ideological struggle, the well-known religious conflict and a latent territorial (South vs North) conflict – the latter exacerbated by the presence of strong geographical differences - contributed to structure the Italian party system of the so called First Republic (1948-1993). Multiple cleavages coupled with a proportional electoral system - with a very permissive entry threshold - favoured both the consolidation and the persistence of a large number of parties characterizing what Sartori (1976) labelled as “polarized pluralist” party system. Indeed, until the early-Nineties, the Italian party system was based on seven nation-wide parties. The neo-Fascist Italian Social Movement (MSI) occupied the extreme right of the political spectrum, whereas, on the left front, the Italian Communist Party (PCI) soon became the second largest political party in Italy as well as the strongest communist party in Western Europe. Conversely, the Italian Socialist Party (PSI) was crossed by deep divisions and splits which, coupled with lower organizational resources, contributed to the progressive hegemony of PCI in the left camp. At the centre of the party system, the Christian Democratic party (DC) - which acted as “guarantor” of the democratic regime and could count on the open support by the Catholic Church - was the largest and dominant political party. In various combinations, it formed unstable governing coalitions with the smaller parties that animated the broad spectrum of Italian “moderate” parties: the social-democratic PSDI on the centre-left, the Republicans (PRI) and the Liberals (PLI) on the centre and the centre-right respectively, the Socialist Party after 1962. The extreme fragmentation of the party system as well as the relevance of the State/Church – in addition to the Left vs Right - cleavage allow including the party system of the First Italian Republic in the *Fragmented Pluralism* category.

#### *3.4. Policy inertia: lacking minimum income protection in the traditional welfare model*

In the period between 1945 and 1975, also due to the social dividend generated by strong economic growth, a remarkable expansion of the welfare state occurred in Italy as in the rest of Europe. It

followed, however, two main routes: the notable expansion of Bismarckian contributory income maintenance schemes (especially pensions) – and the shift to a Beveridgean universalistic National Health Care system in 1978.

In the field of social assistance, despite the Constitutional prescription (Art. 38) that “every citizen unable to work and without the necessary means to live has the right to maintenance and social assistance”, in the three decades after the Second World War, governments did not implement this provision. A plethora of public institutions at the national and local levels, flanked by private and Catholic Church-based charities, continued to provide patchy social assistance to the poor (Fargion 1997). Public social assistance relied on both the social (1969) and the disability pension (1971) - respectively targeted to poor elderly and disabled people - as well as on some contributory benefits (family allowances, invalidity pensions, maternity leaves, etc.) for some specific categories only. The absence of a minimum income scheme for the working age population was thus a trademark of this underdeveloped social assistance regime (Saraceno and Negri 1996) - together with strong reliance on a subsidiarity model, both along the horizontal and (after the 1970s) the vertical dimensions<sup>7</sup>.

The *latent* socio-political demand combined with a ‘*fragmented* pluralist’ party system allow explaining the ‘neglect’ of MIS in the phase of welfare consolidation and expansion. Indeed, the two main parties of the Italian First Republic, Christian Democracy (DC) and the Communists (PCI), had important yet different ideological and strategic reasons to oppose the introduction of a MIS. On the one hand, DC was a party of religious defence that embraced the principle of horizontal subsidiarity, by emphasizing the importance of traditional family role and ties also in providing help to those in need, as well as supported the broad network of religious community-based welfare institutions (Madama 2010). On the other, the Italian Communist Party (PCI) was actually far more inclined towards the extension of generous social insurance schemes targeted to workers -

particularly in large corporations and the public sector - in order to fulfil trade unions' requests, rather than sponsoring residual MISs (Ferrera et al. 2012).

Thus, in the mid-1990s, Italy was one of the few European countries where a minimum income scheme was fully missing: the public last resort safety net was rudimentary, fragmented and mostly relying on contributory schemes, whereas social services and activation measures were underdeveloped, and households, kin networks and third sector organisations played a major role in providing poverty relief (Fargion 1997, Madama 2010, Negri and Saraceno 1996). Policy inertia had prevailed in the field of MIS for five decades already.

#### **4. The Second Republic (1993-2012): path departure and policy reversals in minimum income reforms**

##### *4.1 A weak socio-political demand*

Between the mid-1990s and 2013, the socio-political demand for minimum income protection differed from previous decades. Especially after the so called 'Treu' reform de-regulated 'at the margin' the Italian labour market (Jessoula and Alti 2010), proposals to strengthen non-contributory benefits entered the political arena. However, powerful social actors rarely, and timidly, supported them: on the one hand, religious and social actors remained rather unenthusiastic about MIS (Laloti, 2016, Saraceno 2006), on the other, trade unions were divided and generally reluctant to support targeted benefits. In particular, the moderate union CISL was among the firmest opponents of a MIS, arguing that income support measures should be restricted to workers, whereas it is the duty of society as a whole – especially households and faith-based organizations - to tackle poverty, not a government's responsibility. The leftist Italian Confederation of Labour (CGIL) was more ambivalent: though never really promoting its introduction, CGIL was open to government proposals to introduce such programs if linked with active labour market policies. Finally, similar to CISL, in

this phase faith-based organizations never actively supported MIS, also because the Italian Church considered priority to exert pressure in the political arena in the 'ethical' rather than in the 'social' domain.

Meanwhile, a new social actor appeared, strongly advocating in favour of minimum income: social movements (Mattoni 2009, Natili 2019). Indeed, in an effort to mobilize the 'new' constituency of "precarious" workers, social movements started reflect on the importance to ensure income security to non-standard workers, proposing the introduction of a basic income or, as 'second' best option, a guaranteed minimum income. In the late 1990s, the introduction of these benefits became a central claim of the so-called *Tute Bianche* movement (Fumagalli and Lazzarato 1999), and it was were later taken up (mainly) by "San Precario" Network, which was able to organize mass mobilization of precarious workers in several municipalities - in particular with the EuroMayDay protest which spread from the 2001 Milan edition to involve eighteen European cities in 2005 (Mattoni 2009). This at least partly changed the politics of MIS in Italy as socio-political demand was no more 'latent', though it remained rather *weak* and fragmented.

#### 4.3 A still fragmented, bipolar party system

In the early 1990s, the end of the First Republic brought about a swift change from a polarized pluralist to a fragmented pluralist party system, with two large coalitions forming respectively on the centre-left and the centre-right of the political spectrum. In the centre-right camp, the main novelty represented by Silvio Berlusconi's personal party Forza Italia (FI) forged an alliance including two minor Christian democratic parties heirs of DC (CCD and UDC), and the emerging right wing forces - the Northern League (LN) in Northern regions, and the post-fascist National Alliance (AN) in Central and Southern Italy. In the opposite camp, the Left Democratic Party<sup>8</sup>, one of the two successors of PCI, assumed a pivotal role in centre-left coalitions starting with the 1996 elections:

the alliance brought together one of the successors of the Cristian Democrats, the Italian Popular Party (PPI)<sup>9</sup>, the Federation of the Greens and several smaller centrist or moderate-left parties. In 1996 and in 2006 this coalition was also able to reach an electoral agreement with its main competitor on the left, the Party of Communist Refoundation (PRC).

In this new scenario, in addition to competition along the typical left-right dimension, within poles competition gained prominence, and both the Church/state and the centre/periphery cleavages became increasingly salient. The latter was especially activated by the increased power of the Northern League, a territorial party primarily interested in policy rescaling with the aim of reducing territorial redistribution to the advantage of Northern regions. As to the former, despite the disappearance of a confessional party such as DC, Catholic values – and the Catholic Church as well – gained salience in national politics, structuring the political system and shaping political conflicts and dynamics (Naldini and Saraceno 2008): centre-right parties – especially FI and AN – openly endorsed Catholicism and the traditional family as the cornerstone of society (Fasano and Pasini 2012). Importantly, the two revived cleavages to some extent overlapped with the traditional left-right divide as follows: left–State–centre vs right–Church–periphery (cfr. Jessoula et al. 2014, p. 7) – even though, on specific occasions and issues, they contributed to intra-coalition conflicts and within-pole electoral competition.

### *3.4 A unique policy trajectory: path departure(s) and policy reversal(s)*

In 1996, with the first centre-left government of the Second Republic, a wide debate sparked over the imbalances of the Italian welfare state and the underdevelopment of social assistance policies. Framed by the “cognitive” inputs coming from the European arena (Jessoula and Alti 2010), a number of innovative measures were adopted by the Prodi government. For our purposes, the two most promising innovations were the launch of a “Minimum insertion income” (Mii) pilot scheme

in 1998 and the approval of the framework law on social assistance in 2000 (L. 328/00). Interestingly, the experimental Mii was designed as a non-categorical cash transfer targeted to people with income below a poverty threshold complemented by activation programs aimed at tackling social exclusion and stimulating recipient autonomy. The measure was initially introduced as a pilot scheme for two years in 39 selected municipalities, then the 2000 budget law provided for a 2-years extension of the experimentation and increased the number of involved municipalities.

Despite more room for (fiscal) manoeuvre, in the legislature 2001-2006 the social assistance sector was all but reinforced (Jessoula et al. 2014, Madama 2010). Actually, the centre-right government did not only privilege a welfare model based on *family* and *community networks* (cf. Ministero del Welfare 2003), it also fiercely opposed the development of a robust *national* anti-poverty strategy based on the institutionalization of MIS. National social policy funds were drastically cut and the Mii scheme, depicted as too expensive and ineffective by the Northern League Minister of Welfare, was not extended to the whole national territory and ultimately discontinued, this resulting in a neat *policy reversal*.

The termination of the Mii was officially ratified in July 2002 in an agreement (*Pact for Italy*) signed by Berlusconi's government with the two moderate unions CISL and UIL. Indeed, the absence of a strong pro-poor advocacy coalition, and the divisions among trade unions favoured this outcome. Weak *demand* was not the only factor leading to policy reversal though. In order to fully understand the latter, it is necessary to bring political offer into the explanatory framework. Actually, the activation of competitive dynamics along the centre-periphery cleavage by the Northern League, which then controlled the Ministry of Social and Labour Policy, led to repeal the pilot MIS because it would have redistributed resources from the richer areas in the North to poor regions in the South. Interestingly, a similar policy trajectory can be detected at the sub-national level (Natili 2018). Since the mid-2000s, in sharp contrast with the decision of the Berlusconi II Government on Mii, several

regions ruled by centre-left coalitions<sup>10</sup> introduced regional minimum income schemes. In these regions social movements pushed the issue on regional governments' agenda<sup>11</sup> and MISs were introduced only after an agreement with the main trade union CGIL was found. By contrast, policy inertia prevailed in other regions, especially those governed by centre-right coalitions. Moreover, in all the regions where a MIS was introduced by centre-left and a centre-right coalition succeeded in the subsequent political election, established anti-poverty programs were rapidly discontinued. Campania, Friuli Venezia Giulia, Lazio, and Sardinia experienced such a neat "*policy reversal*", similar to what had happened at the national level.

The advent of the global crisis in 2007-08 did not significantly alter these dynamics. Rather, as response to the dramatic increase of poverty, the new Berlusconi government stressed the virtues of the traditional "subsidiarity model", based on the key role of households and faith-based associations in fighting poverty in Italy, and launched only minor emergency measures between 2008 and 2011<sup>12</sup>. In fact, despite increased functional pressures, the socio-political demand for MIS remained weak and fragmented, while the centre-right governing coalition - including the Pole of Freedoms (*Polo delle Libertà*, PDL) and the Northern League – implied the political activation of both the centre/periphery and the State/Church cleavages: under these conditions, the interplay of political demand and supply prevented the modernization of the Italian social safety net (Natili 2019)

In sum, during the Second Republic, minimum income protection did not institutionalize at the national level and at the regional level either. Interestingly, however, this was not the result of political inertia, but rather of an inconsistent policy trajectory, characterized by path departures and policy reversals, which both reveal - and they were the result of - contentious political dynamics. Against the backdrop of weak and divided socio-political demand, centre-left government(s) timidly claimed credit by proposing the introduction of MIS; by contrast, centre-right coalitions acting as

both veto players and policy dismantlers - never promoting these programs and immediately repealing them once in government – in order to gain political support among MIS opponents. This brings support to our theoretical expectations: with weak demand and fragmented pluralism, the introduction of MIS under a centre-left coalition is likely to be followed by policy-reversal when political alternation brings right wing parties back in government.

## **5. Game changers: strong demand & new party system explain the end of Italian Exceptionalism**

### *5.1 The emergence of 'strong' socio-political demand for minimum income*

When the (particularly long lasting in Italy) Great Recession percolated into significantly higher poverty rates<sup>13</sup>, these developments contributed to substantially modify the socio-political demand for minimum income in Italy. Both trade unions and religious organization –and in particular, ACLI and Caritas -shifted from an ambivalent and mostly sceptical position vis à vis MIS to openly campaign for its introduction. This led to the formation, in early 2014, of a broad advocacy coalition of different interest groups, called the Alliance Against Poverty. For the first time, a broad and inclusive network of actors ranging from charities to NGOs and trade unions started to actively advocate the introduction of a national MIS (Gori et al., 2016, Jessoula and Madama 2015). Beyond this “new” social actor, social movements continued to be particularly engaged in this policy field. In 2013, they launched a new campaign and collected enough signatures to submit law proposal to establish a Minimum Guaranteed Income, which then had to be discussed in Parliament, while a second network including other relevant NGOs was created, soon launching another campaign (“*Miseria Ladra*”) to combat poverty and social exclusion. In a nutshell, after decades of apathy, between 2013 and 2018 socio-political demand became suddenly *strong* in the field of minimum income protection in Italy.

## 5.2 *The party system: towards a 'Third Republic'?*

On the supply side, with the 2013 legislative elections also the Italian political landscape changed radically. The party system was affected by the unexpected rise of a *populist* catch-all party, the 5 Star Movement (M5S), which became the first Italian party in terms of votes, although it was slightly outnumbered by both the centre-left and the centre-right coalitions. Since this 'new' challenger did not place itself along the left–right dimension, the main consequence of its rise was the exhaustion of the bipolar party system emerged in the 1990s (Bull and Pasquino 2018, Karremans, Malet and Morisi 2019). Although the party system remained 'fragmented pluralist', it shifted from bipolar to three-polar, and the logic of political competition changed markedly, also affecting – as we will see below – the politics around MIS.

Against such backdrop, it is in fact important to emphasize that, although the M5S was not “a new left party, [it, *ndr*] has partially played the same role as other new left parties in Southern Europe by exploiting the economic uncertainties of Italian voters” (Karremans, Malet and Morisi, 2019, p. 138). This party indeed made the introduction of a MIS called Citizenship Income its top priority. Since this scheme was specifically targeted towards the least empowered part of the population, and it had not been strongly sponsored by either left parties or trade unions, this proposal was in line with the 'innovative' and strongly 'anti-establishment' platform characterizing 5SM's programmatic agenda.

## 5.3 *The Times They Are a-Changin': introduction of a national MIS, end of the Italian exceptionalism*

The parallel transformations of both socio-political demand and political supply were key game changers in Italian social assistance politics and, consequently, policies.

While absolute poverty and material deprivation rose dramatically during the Great Recession (2008-14), deregulating labour market reforms in 2012 and 2015 went well beyond 'flexibilization

at the margin'. Also prompted by these changes, confessional organizations (Caritas and Acli) substantially reshuffled their social policy priorities thus contributing to reinforce socio-political demand that finally became *strong* when trade unions joined the former to create a new actor powerful actor – the Alliance Against Poverty – pushing for the establishment of MIS.

Meanwhile, also the national political arena was significantly restructured, and the centre/periphery and the State/Church cleavages became much weaker in structuring competition over MIS. On the one hand, the Northern League was excluded from the vast coalition ranging from centre-left to centre-right parties supporting the new government that was formed after the 2013 elections, and gradually modified its ideological underpinning, shifting from a territorial, regionalist party to a political force with a national and 'sovereign' vocation – the word 'Northern' was also dropped by the League in 2018. On the other hand, the 'new' support for minimum income protection among faith-based associations prevented the activation of the Church-State cleavage against the full institutionalization of a MIS by the 'parties of religious defense'. Furthermore, the populist catch-all party, the 5 Star Movement (M5S), became the main competitor of governing parties: this party had, since its origins in 2009, strategically taken on board the demands of social movements to introduce a MIS. Indeed, M5S considered the introduction of MIS functional to its 'new' political message stressing the divide between people and (mainly political) élites, but also to its initial strategy to gain support especially on the centre-left (Diamanti 2014). Thus, after the 2013 general elections, strengthened advocacy and reinforced political competition dynamics - especially between the M5S and the Democratic Party (DP) in the centre-left pole – gradually increased MIS salience in the Italian political debate. Policy developments followed. The new government led by Letta from the Democratic Party extended the pilot, residual anti-poverty programme called New Social Card - introduced by the Monti Government in 2012 – to the 12 most populated cities. Then, with the following governments led by Renzi (DP) and Gentiloni (DP) – still supported by a broad

coalition, but more centre-left driven after Berlusconi's decision to leave the parliamentary majority - poverty finally gained prominence among government's priorities. In 2015, the New Social Card was replaced by a nation-wide programme named "Active Inclusion Support" (SIA), which was however limitedly funded - only €167 million were devoted to this measure – and it could not be considered a fully-fledge MIS especially in light and its categorical access requirements<sup>14</sup> – which actually represented an *unicuum* as compared to MISs in European countries.

Further, in 2017, Legislative Decree 147/17 replaced SIA with the so called Inclusion Income (REI), starting in January 2018. Similar to the latter, REI was designed as a means-tested monetary benefit conditional upon signing an "individual social contract" aimed at promoting active inclusion through individualized plans and service provision. However, differently from SIA, REI was a *structural* - not a pilot - measure without (after July 2018) the categorical requirements that characterized the SIA. Thus, two decades after the launch of the pilot Minimum Insertion Income, Italy eventually introduced a national MIS. Importantly, this was the result of a negotiation process between the Gentiloni government and the Alliance Against Poverty which led to the signature of a joint "Memorandum" which proves that political supply effectively "intercepted" the stronger socio-political demand for MIS. Actually, the Democratic Party in government introduced REI in an attempt to claim credit from powerful social groups – primarily the three trade unions Cgil, Cisl, Uil, besides Caritas and Acli – potentially a key factor in the competition with the 5 Stars Movement, perceived as the most dangerous competitor.

Nevertheless, some features of REI made the program peculiar in comparative perspective: indeed, it was one of the least financed, generous and inclusive minimum income scheme in Europe (\*\*). Due to severe budgetary constraints, only a limited number of poor individuals could receive this benefit, which was also very meagre - equal to €187.5, i.e. 23.7% of the relative poverty line, for single member households. Furthermore, strict duration limits, constraints on beneficiaries'

discretion in the usage of the monetary component as well as a pervasive sanctioning system led experts to question the effectiveness of REI in actually “empowering” the poor (Granaglia 2018).

Despite the weaknesses of REI, the Democratic Party, desperately seeking for consensus after the 2016 (failed) attempt to reform the Constitution and the highly contested 2015 labour market reform, attempted to ‘exploit’ the introduction of MIS in the 2018 electoral campaign, strategically framing it as a concrete response to poverty diffusion vis à vis the “unrealistic promises” of the M5S. Nevertheless, the subsequent political elections represented an earthquake for the party system as a whole and for the DP, which was severely outperformed in terms of votes by the 5 Star Movement<sup>15</sup>. Subsequently, after months of negotiations, the latter decided to build a coalition government with the other political force gaining the electoral ballot, The (formerly Northern) League – now turned into a national, i.e. no more territorial, party. Not surprisingly, considering that the 5 Star Movement was the coalition leader in light of the higher share of parliamentary seats vis à vis The League - strengthening minimum income protection, which was the battle horse in M5S’ programmatic agenda, become one of the key objectives of the new government.

Thus, a few months after the establishment of Conte I Government (M5S-The League), Law Decree No 4/2019 introduced the Citizenship Income (RdC), replacing REI since April 2019. Although the name recalls the idea of a universal unconditional basic income, the Italian RdC is a monetary benefit targeted to poor households conditional on participation to job-search activities: in other words, it is a means-tested minimum income scheme. Compared to REI, RdC is endowed with much more budgetary resources<sup>16</sup>, it is more generous<sup>17</sup>, inclusive and with less strict duration limits. At the same time, RdC is characterized by even stricter conditionality rules for beneficiaries and a very strong ‘work-fare’ activation profile in a country as Italy where labour demand is persistently limited - especially in Southern regions. Furthermore, in order to increase the number of beneficiaries without expanding costs, the Government introduced an equivalence scale for computing the RdC

amount that favours single member households, whereas it is detrimental for large families, thus providing relatively fewer resources to poor children (Saraceno 2019). Importantly, it must be emphasized that, in order to reach an agreement with The League, eligibility conditions for immigrants were significantly tightened: indeed, the 10-year residence requirement and the obligation to provide detailed certificates about their wealth in the origin countries exclude many poor immigrants from RdC provision.

Despite the important limitations above, after path departure with REI in 2018, the introduction of the RdC finally put an end to the Italian “exceptionalism”: a fully-fledged MIS with no budgetary constraints - which is actually the most generous in Southern Europe in terms of overall expenditure, benefit level and inclusiveness as well - eventually institutionalized minimum income protection in Italy.

### ***Conclusions***

In this article, we have illustrated the Italian trajectory of minimum income protection and proposed an explanatory framework centred on the interplay between socio-political demand and political supply, which has proven fruitful to interpret the changing politics of MIS, and ultimately understand policy outcomes in three very different periods: the long lasting phase of political *neglect* (late 1940s-early 1990s), the subsequent period marked by attempts of *path departure* followed by *policy reversals* (mid-1990s until 2012), and the more recent years, with the gradual strengthening of the anti-poverty safety net and the final *introduction* (2018), and subsequent *institutionalization* (2019), of a national MIS.

In the phase of neglect, socio-political demand remained *latent*, since neither trade unions nor faith based associations challenged the traditional Southern European model of addressing poverty, based on intra-households redistribution, kin networks and charities. Under these conditions, there

were too limited incentives for political parties to invest in innovative anti-poverty measures, which would de facto benefit an under-represented part of the Italian population. In the context of a *fragmented, polarized pluralist* party system, the harsh conflicts and political competition – mainly between the left opposition (the Communists and, initially, the Socialists) and the Christian-Democratic led governments – unfolded around much more politically remunerative contributory schemes (pensions, wage supplementation funds, healthcare), which catalysed socio-economic demand, notably by trade unions. Policy *inertia* in MIS consequently prevailed.

Things started to change in the 1990s, when structural transformations pushed minimum income protection into the public and the political debate. Some supporters (i.e. social movements) also appeared on the demand side, although the latter remained *weak* and fragmented mostly due to both trade unions' and faith based organizations' ambivalence on the issue. Against such backdrop an indeed peculiar policy trajectory materialized: centre-left governments – also inspired by supranational EU's cognitive inputs – timidly responded to functional pressures by introducing some innovative pilot MISs, both at the national and the regional level. However, attempts to deviate from the traditional path were blocked by centre-right cabinets' reaction, which soon led to policy reversals. This was possible because, in a context of weak socio-political demand – i.e. no mobilization and divisions across relevant social groups – in a still fragment, now bipolar, party system it was far more convenient for right wing parties to *claim credit* by *opposing* a measure which would challenge the subsidiarity model, both along the vertical and the horizontal axes – or, in other words, along the centre/periphery and the State/Church cleavages which were key competitive dimensions for the Northern League and Berlusconi's Forza Italia party respectively. Such dynamics persisted when functional pressures grew stronger with the 2008-9 economic crisis. Most interestingly, however, in subsequent years, the transformations of both socio-political demand and political supply were key game changers in the field, and MIS became a hyper-

politicized issue. Political demand became suddenly strong in Italy when a broad and inclusive network(s) of actors ranging from charities to NGOs, from trade unions to social movements coalesced to actively advocate the introduction of a national MIS. A parallel radical transformation invested the supply side, since the result of the 2013 national elections made the competition between the centre-left Democratic Party and 5SM key in shaping MIS policy-making, at a time when the State/Church and centre/periphery cleavages became much weaker in structuring party competition. The presence of a *strong demand* combined with competition on the left front led, first, to *path departure* – with the introduction of REI - and then to the end of Italian exceptionalism, with the approval of RdC, which implied MIS full *institutionalization* despite the presence in government of one of its main opponents – The League. To be noticed, The League's substantial green light to the adoption of RdC suggests that if *strong demand* and changed competition dynamics in a fragmented pluralist party system were key for the full institutionalization of MIS, under these conditions policy reversals are much more unlikely than in the past two decades. Rather than full abrogation, tightening of eligibility requirements and/or restrictions on benefit generosity for certain social groups are more plausible in case of a future centre-right government in Italy.

The explanatory framework presented in this article seems therefore accurate to interpret MIS reform trajectory in light of underpinning political dynamics. Against this backdrop, for an all-encompassing understanding of the politics of MIS across countries, two research routes appear particularly promising. First, it would be worth exploring the factors that shape socio-political demand and foster interest groups to take up the issue of minimum income, in line with recent contributions on the condition under which trade unions adopt 'pro-outsiders' social policy (Durazzi et al. 2018). Second, minimum income protection constitutes a particularly interesting policy domain to disentangle the complex relations between 'bottom up' domestic pressures and supra-national responses in period of austerity and mounting social crisis. The Italian trajectory in

minimum income reforms described above outlines that domestic politics is always key, also when supranational macro-economic governance stands as a particularly unfavorable context for welfare state expansion (Natili and Jessoula 2019, Vesan and Ronchi 2019). Further research is, however, needed to better characterize this two level political game.

## Notes

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<sup>1</sup> In this article we adopt a narrow definition of MIS which does not cover the entire range of social assistance benefits but only anti-poverty benefit for the working-age population. MISs are thus here defined as non-categorical, anti-poverty schemes providing rights-based, means-tested benefits that are typically flat-rate and tax financed.

<sup>2</sup> Kevins (2015) uses two survey questions to support his argument: the first is from the European Values Studies ('to what extent do you feel concerned about the living conditions of unemployed people'), the second from the International Social Survey Programme ('On the whole, do you think it should or should not be the government's responsibility to provide a decent standard of living for the unemployed'). Since the institutional design, the target constituency as well as the underpinning normative assumptions of social assistance programmes are very different from social insurance schemes, both questions appear ill equipped to capture individuals preferences (and thus social demand) on MIS.

<sup>3</sup> Several scholars emphasized that the beneficiaries of targeted benefits — namely, the poor — are unlikely to organize themselves in pressure groups, have limited mobilisation potential and constitute in advanced economies a scarcely relevant electoral constituency (Bonoli 2005; Clegg 2013).

<sup>4</sup> Relevantly, the interest groups involved in the politics of MIS in a country cannot be presumed theoretically and defined *ex ante*; by contrast, they need to be detected empirically, analysing which actors take position in the political arena on this particular issue.

<sup>5</sup> For an application of the model to moderate pluralism, see (Natili 2019).

<sup>6</sup> For a different argument related to Latin American countries see Garay (2016).

<sup>7</sup> The lack of a national regulatory framework allowed a high degree of territorial variation in terms of programs, beneficiaries and generosity (Fargion 1997, Madama 2010).

<sup>8</sup> From 1998, Left Democrats. In 2007, Left Democrats and centre party named Daisy merged into the Democratic Party.

<sup>9</sup> Since 2000 it has merged with other smaller centrist parties in a new centre party called Daisy.

<sup>10</sup> These were Basilicata, Campania, Friuli Venezia Giulia, Lazio, Puglia and Sardinia.

<sup>11</sup> More precisely, at the local level, the pressure exerted by the social movements captured the attention of the radical-left party Communist Refoundation (PRC) which then contributed to include regional safety nets

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in the regional agenda of centre-left government. For an empirical reconstruction of the Friuli Venezia Giulia and Lazio case, see Natili 2019.

<sup>12</sup> The so-called *Carta Acquisti* was introduced. It was a pre-paid card used to purchase food and pay for utilities, initially intended to support low-income pensioners (over 65) and later extended to children below the age of 3. The extremely low value of the SC (€40 per month), its categorical character and limited coverage, tight eligibility criteria, and the absence of activation requirements indicate the residual and passive (if not merely symbolic) nature of the programme.

<sup>13</sup> According to the Italian National Statistics Office, in 2006, in the pre-crisis scenario, the absolute poverty rate was 2.9%; it more than doubled in the following years, reaching 5.7% of the population in 2011, and 8.4% in 2018 – corresponding to 5 million people.

<sup>14</sup> To access the SIA poor households had to meet at least one of the following conditions: i) one child younger than 18 years; ii) a disabled child; or iii) a pregnant woman.

<sup>15</sup> The Democratic Party obtained 22.9% of votes at the Chamber of Deputies (5SM 32.7%) and 23% in the Senate (5SM 32,2%).

<sup>16</sup> In detail, yearly budgetary resources allocated to the ‘Fund for the Citizenship Income’ are €7.0 billion in 2019 increasing up to €8.5 billion from 2021 (ca. €5.8 billion more than yearly resources allocated to REI).

<sup>17</sup> The benefit amount increases with family size and the maximum amount ranging from €500 for a single-member household to €1000 for a five-member household in presence of three children aged less than 15.

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