



Ministero del Lavoro e delle Politiche Sociali

**REPORT ON THE FOLLOW-UP TO THE REGIONAL IMPLEMENTATION STRATEGY (RIS) OF
THE MADRID INTERNATIONAL PLAN OF ACTION ON AGEING (MIPAA) IN ITALY**

January 2012

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Executive summary

1. Over the past ten years the percentage of individuals aged 65 and over increased from 18.4% (2001) to 20.3% (2011), an increase of 1.8 million of persons in this age group. In the same period, the number of children under 14 increased by about 348 000 units, bringing the relative share to 14% of total (14.3% in 2001). Even the of the working age population, while increasing over the decade of 1 million 456 thousand units, has now less percentage than in 2001 (65.7% versus 67.3%).

The growth of population aged 85 and over was also very quick. In 2001 the over eighty-five were 1 million 234 thousand, or 2.2% of the total. Today, they are 1 million 675 thousand, or 2.8% of the total.

2. Since the end of 2008 a set of interventions was carried out aimed at combating poverty and social exclusion, which also targeted the elderly population. In particular, we describe the following actions: the Social Card, the Family Bonus, the Electricity Bonus and the Abolition of the Municipal Property Tax (ICI) on the place of residence. According to the analysis conducted by the Commission of Inquiry on Social Exclusion, the impact of the social card reduces the spread of absolute poverty of Italian households by 4.27% to 4.1%: it was expected that about 40,000 families in a million could come out from absolute poverty. The second measure should lead to a reduction of the ratio of poverty of about 0.32%, or rather about 76.800 families should come out of poverty. As concerns the electricity bonus, by virtue of the low amount expected, the measure is still considered to have a limited impact on poverty reduction, while the abolition of ICI would have involved over 65 people to a greater extent than the younger age classes.

3. The spreading of the financial crisis in late 2008 and the persistence of the instability of financial markets, have determined, from 2009, the launch of a set of measures aimed at protecting companies and workers from the effects of the crisis and, on the other hand, to limit strongly Government's spending, in order to reduce the burden of debt. This effort culminated in the adoption the *National Plan of Stability*, as a result of obligations under the Euro Plus Pact (or Pact for the Euro), approved on 24 and 25 March 2011 by the European Council and by the Heads of State and Government. The Pact calls on Italy, like other European partners, to strengthen the rules and actions necessary for national budgetary discipline, particularly to ensure compliance with the constraints on net debt and on the debt/GDP ratio. In support of the effort for rationalization and restraint of expenditure, the Government has continued the reform already started in the previous years, identifying priority areas of action which may act as factors of boosting economic development.

4. In 2009 the total annual amount of pension social security paid in Italy amounted to 253.48 billion euro, a value corresponding to 16.68% of gross domestic product (GDP). The total expenditure increased by 5.1% over 2008, while the share of GDP grew by 1.3 percentage points over the previous year. 23.8 million were paid on pension provisions, for an average annual amount of 10,634 euro. The number of beneficiaries of pensions was more than 16.7 million, in slight decrease compared to 2008 (-0.27%), with a number of pensions per capita of 1.4. Although the proportion of women is 53%, men receive 55.9% of pension incomes, due to the higher average amount of treatment received (18,029 euro vs 12,597 euro per woman).

Over the years covered by this Report, an effort of reform went on, which aimed to reach two objectives widely shared at European level: a) gradually raising the retirement age, mostly on a voluntary basis, through the extension of working life and the development of individual private social security, financed with the severance pay (TFR). In the period between 2007 and 2009 the average age of retirement from work showed an ups and downs trend. It has gone from 60.4 years in 2007 to 60.8 in 2008 before falling to 60.1 in 2009.

5. In the domain of the labour market, in the period under consideration, interventions which may involve the older portion of population in working age, were concentrated in the implementation of the new legislation on health and safety at the workplace, which came into force in 2008, providing specific

obligations for both workers and employers; in adopting specific measures aimed to limit the effects of the crisis on labor supply; in liberalizing the intermediation between demand and job supply. The extension of welfare support provisions for unemployment or risk of firing has been coupled with the implementation of a database of recipients of public income support. The effort towards the fulfillment of the labour market reform, which had started in the late 1990s, has led the Government to launch, in July 2010, the Three-Year Plan for Employment.

6. The percentage of the adult population (25-64 years) participating in training activities and/or education in Italy remains at a lower rate to the average of European countries (EU15), covering around 6% compared to 10,6% in Europe. Population between 35 and 64 is less involved in training, so the participation decreases as age increases. In the older population (55-64 years) the percentage drops to 2.2 %, reaching only half of the corresponding European average and almost four points below the national average, although with a slightly positive trend in recent years. In the considered period the Government managed to reform adult education and to enhance continuous training interventions in order to support workers hit by the economic crisis.

7. In 2008 the percentage of persons 65 and over who used home health care amounted to 3.3%. Between 2001 and 2008 this share increased by more than a point, with a greater increase in Northern and Central Italy (+1.4 points) in comparison with the South (+1.1).

According to 2009 data from the Ministry of Health, persons over 65 are the major group benefiting from home care, with peaks of 91.7 and 90.6 in Liguria and Emilia-Romagna. The Southern Regions, on average, provides less assistance to elderly population. The total public expenditure for LTC amounts to 1.9% of GDP in 2010, of which about two thirds devoted to persons over 65 . The health component is 46.4% against 43.3% devoted to care allowance (*indennità di accompagnamento*) . Other welfare benefits cover however about 10.3%. This expenditure is 0.86% of GDP and is 12% of the total health expenditure

On the prevention side, the Ministry of Health, in collaboration with the Institute of Health (CNESPS) and the Umbria Region, in 2008 started a study called "Silver Steps", which aimed to test and then fully implement, along with the Italian Regions, a methodology for epidemiological surveillance on the health and quality of life of older people.

8. The National Conference on the Family in November 2010, reaffirmed the intention of the Italian Government to promote the development of policies aimed at developing services that support the different moments of transition that characterize the individual life cycle, promoting the generational exchange and supporting specifically families in caring for their older members.

The share of the social services for the elderly population, while representing the second area of investment by Municipal Authorities after the family, until 2008, has experienced a steady decline from 23% to 21% of the total. Almost half of the expenditure has been allocated to the implementation of home care (38.3%), payments (27.8%) and the development of community and residential facilities (16.6%). 17% of payments has been committed to residential services, which have pledged some 233 million euro. Local social policies seem to have moved towards the development of home care services, while costs associated with residential services still remains an element of strong investment of public spending.

With regard to the care of non autonomous elderly people and families, a key instrument for services delivery has been represented by the establishment of the National Fund for Non autonomous Persons (FNPS). The National Fund represents from 2007 the attempt to ensure essential levels of health and social services for non autonomous persons and reassemble interventions in an area that experienced over time fragmentation among decision makers.

In support of the Fund, since 2009 the Ministry of Labour launched an experimental project for the creation of a National Information System on non autonomous persons.

General information

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National Strategy on Ageing: Currently being defined

1. National ageing situation

1.1. *The national context of ageing - demographic indicators*

Over the last years the population continued to grow counting 60,626,442 residents at 31 December 2010; an increase of 286,114 units (+0.5%) due solely to migration¹. The dynamic of migration is once again crucial to the population growth. Foreign nationals, amounting to over 4 million and a half, are constantly increasing and constitute 7.5% of the total.

Compared to the previous year are down both births and the number of deaths; consequently the natural dynamic is even more negative (-0.4 per thousand) than the previous year.

The fertility is slightly decreasing (1.4 children per woman); it seems to be over, particularly among Italian women, the recovery phase occurred for a large part of the last decade.

The longevity appears as one of the factors that more widely influence the dynamics of Italy's aging population. The average life span makes further progress: 79.1 years for men, 84.3 years for women with, respectively, a gain of three and two-tenths of on year 2009². It follows that at the age of 65 years the remaining life expectancy is 18.3 years for men and 21.9 years for women, in 2010.

Over the past ten years the percentage of individuals aged 65 and over increased from 18.4% (2001) to 20.3% (2011), an increase of 1.8 million of persons in this age group. In the same period, the number of children under 14 increased by about 348 000 units, bringing the relative share to 14% of total (14.3% in 2001). Even the of the working age population, while increasing over the decade of 1 million 456 thousand units, has now less percentage than in 2001 (65.7% versus 67.3%).

The growth of population aged 85 and over was also very quick. In 2001 the over eighty-five were 1 million 234 thousand, or 2.2% of the total. Today, they are 1 million 675 thousand, or 2.8% of the total.

Over 65 years of age, women are much higher in number than men but the differential between women and men aged 65 years and is declining: in 2001 there were 143 women aged 65 years and over for every 100 men of the same age group, while today there are 137.

As result of the increasing number of elderly, the average age of the population continues to rise: from 41.7 years in 2001 to 43.5 in 2011.

1.2. *The national context of ageing - social and economic indicators*

In 2007³ families residing in Italy perceived a net income - excluding the "fitti figurativi" or "imputati" (literally: figurative rent or attributed rent)⁴- amounting at an average of 29,308 euro, about 2,440 euro per month. According to the median income, it results that half of the households living in Italy received less than 24,036 euro (about 2,000 euro per month) in 2007. Of course, the other half had income above this amount.

The elderly living alone have a lower net income: the median value indicates that 50 percent of these families had in 2007 less than 11,999 euro (about 1,000 euro per month), while single people of working

¹ ISTAT, *Bilancio Demografico Nazionale*, ISTAT, Statistiche-Report, May 24, 2011

² ISTAT, *Indicatori demografici 2010*, ISTAT, Press release, January 24, 2011.

³ ISTAT, *Condizioni di vita e distribuzione del reddito in Italia – Anno 2008*, ISTAT, Statistiche in breve, December 29, 2009.

⁴ Figurative rent or attributed rent: Estimated cost for families who live in home ownership, usufruct or rent free, to ensure comparability of spending patterns in respect to households living in rental housing. It is therefore a component of income resulting from the property of the house in which you live, based on the estimated price that you would need to pay to lease the house you live in.

age have relied on a higher income (the average was 17,039 euro). Generally, families in which there is at least one elderly have lower income. In particular, the median income is equal to 15,750 euros in families with only one senior and to 23,415 euro in families where the elderly are two or more.

Table 1 - Net household income (excluding "figurative rent") by age of main earner. Year 2007 (values in Euros)

	Median income	Median value
Under 35	28,175	25,052
35 - 44	31,851	28,480
45 - 54	35,636	31,813
55 - 64	36,390	29,415
65 +	20,723	16,321

Source: ISFOL data processing based on data from ISTAT 2009

The median income of younger households (under 35) is higher than that of the families of elderly recipients (65 years and over) - both gross and net of "figurative rents". Including the latter, the gap between the median income of the two household types is reduced.

The employment rate of older workers (55 - 64 years) has steadily grown since 2008, rising from 34.4 to 36.6% in 2010 (Table 2). This increase has shortened the gap with the whole European Union that stood at 11.2 points in 2008 and 9.7 in 2010.

Table 2 - Employment rates of older workers. Comparison of average EU and Italy. Years 2008, 2009, 2010. (%)

	2008	2009	2010
EU 27	45.6	46.0	46.3
EU 25	45.7	46.2	46.6
EU 15	47.4	47.9	48.4
Italy	34.4	35.7	36.6

Source: Eurostat, 2011.

In the period between 2007 and 2009 the average age of retirement from work showed an ups and downs trend. It has gone from 60.4 years in 2007 to 60.8 in 2008 before falling to 60.1 in 2009.

Table 3 - Average age of retirement. Comparison of average EU and Italy. Years 2007, 2008, 2009.

	2007	2008	2009
EU 27	61.2	61.4	61.4
EU 25	61.3	61.3	61.4
EU 15	61.5	61.5	61.6
Italy	60.4	60.8	60.1

Source: Eurostat, 2011

1.3. The description of the social, political and economic situation

Italy is a democratic parliamentary Republic. The sovereignty belongs to the people and is exerted within the limits of the Constitution.

The Republic consists of Municipalities, Provinces, Metropolitan Cities, Regions and the State. Municipalities, Provinces, Metropolitan cities and Regions are autonomous Authorities with their own statutes, powers and functions in accordance with the principles established by the Constitution.

Friuli Venezia Giulia, Sardinia, Sicily, Trentino-Alto Adige / Südtirol and Valle d'Aosta / Vallée d'Aoste have special forms and conditions of autonomy, according to their special statutes adopted by constitutional law.

Legislative power is exerted by the State and the Regions in accordance with the Constitution and the constraints deriving from Community law and international obligations. The federal structure, defined by the current constitutional settlement, is under final completion with particular reference to the complete devolution of fiscal measures (so-called Fiscal Federalism). Fiscal federalism aims to implement *Article 119 of the Constitution* which states the independence of financial revenue and expenditure for Municipalities, Provinces, Metropolitan cities and Regions. The implementation of Article 119 completes the process of constitutional revision contained in the *Constitutional Law No. 3 of October 18, 2001* (reform of Title V of the Constitution).

By the *Act of May 5, 2009, No 42*, "Delegation to the Government on fiscal federalism in accomplishment of art. 119 of the Constitution" were defined principles and criteria for the implementation of fiscal federalism, and was started a process of redefinition of the economic and financial relations among State, Regions and Local Authorities. For this purpose, the law establishes in detail the fundamental structure of the revenue of regional and local authorities; sets out the principles which should regulate the allocation of resources to institutions with fewer self-financing capacity; establish the instruments by which will be ensured the co-ordination among different levels of government on public finance.

On 28 July 2011 the Council of Ministers has definitively approved the legislative decree introducing rewarding and sanctioning measures for Regions, Provinces and Municipalities, in implementing the *Law May 5, 2009, No 42*. The measure, aimed at strengthening accountability, transparency and effectiveness of local governments, introduces among other things the "End of Mandate Report": final account of the activity carried out, public instrument of control on regional and local administrators, in view of political elections (on the text of the Decree have been acquired the opinions of the parliamentary committees).

The spreading of the financial crisis in late 2008 and the persistence of the instability of financial markets, have determined, from 2009, the launch of a set of measures aimed at protecting companies and workers from the effects of the crisis and, on the other hand, to limit strongly Government's spending, in order to reduce the burden of debt. This effort culminated in the adoption the *National Plan of Stability*⁵, as a result of obligations under the Euro Plus Pact (or Pact for the Euro), approved on 24 and 25 March 2011 by the European Council and by the Heads of State and Government.

As is well known, the Pact calls on Italy, like other European partners, to strengthen the rules and actions necessary for national budgetary discipline, particularly to ensure compliance with the constraints on net debt and on the debt/GDP ratio. In support of the effort for rationalization and restraint of expenditure, the Government has continued the reform already started in the previous years, identifying priority areas of action which may act as factors of boosting economic development. The policy areas considered as priorities are described in Commitment 3.

In the same context, the *Stability Law for 2012* (Law 12 November 2011, No. 183) has redistributed the goals of the pact among the single administrations, on the basis of a new criteria of "virtuosity" (lower incidence of financial constraints for "virtuous" authorities and higher incidence for other institutions). According to the purposes of this Report, we signal the forecasts developed by the Ministry of Economy and Finance on the impact of population ageing on public expenditure, with particular regard to pension expenditure, health, elderly care, education and unemployment benefits.⁶ With regard to the projections at issue, in the period 2005-2060 the influence of population ageing should produce an increase in public spending of about 2 points of GDP. Most of this increase is concentrated in the 2008-2009 period, in relation to the decrease of GDP caused by the economic crisis. After 2010 the expenditure would be reduced, to raise again from 2027 until the period 2040-2046. In this period the total weight of ageing-related spending would be around 29% of GDP, in conjunction with the retirement of baby boomers. Thereafter we might see a gradual contraction to levels lower in 2060 than in 2010⁷.

⁵ Ministero dell'Economia e delle Finanze, *Documento di Economia e Finanza 2011 – Sezione I Programma di Stabilità per l'Italia*, Rome, April 2011.

⁶ Ibid.

⁷ Ibid.

2. Methodology

The second cycle of review and appraisal of MIPAA/RIS for Italy has adopted a methodology that includes both a quantitative and a qualitative approach. In considering the fact that the Report on the first evaluation has included the years 2002 - 2008⁸, the second cycle collects the information available for the period from 2009 to 2011.

In the absence of a national strategy for ageing and in relation to the high number of institutions and Public Authorities involved in the management of measures and operations addressed to elderly population, it was decided to adopt an articulated evaluation process, capable of displaying such level of complexity. In particular, the evaluation process has been divided in three steps:

1. Description of the changes that during the considered period have taken place in various areas of policy, separating rules and measures undertaken at national level from those in charge of the Regions and Autonomous Provinces;
2. presentation of the most significant statistical data, useful to illustrate relevant aspects of the elderly population interested in the measures described;
3. consultation phase among public institutions (central and regional level), social partners and civil society associations, on the overall level of advancement of policies for elderly people in Italy.

The results of the first two steps, which were completed in the second half of 2011, represent the contents of the current Report. The structure of the document follows the guidelines proposed in April 2011 and adopted by the UNECE Working Group on Ageing⁹, offering an analysis and evaluation of national action undertaken to respond to the commitments of MIPAA / RIS, articulated according to the ten Commitments. Additional statistical data can be found in the annexes of the text.

The third step, which involves an enlarged debate among Government, Public Administrations (central and local), and civil society, will be launched in 2012 taking advantage of the debate which will be developed during the European Year of Active Ageing and Solidarity between Generations. In this context a national conference will be organized with the aim to appraise the evolution of national policies that target the elderly population¹⁰.

The event, which will take place in spring 2012, will be organized in thematic sessions and will see the participation of Institutions and stakeholders at national and local levels, representatives of European Institutions and other Member States, international agencies (European Commission, UN, CEDEFOP, etc..), as well as researchers involved in the study of the issues under consideration.

The policy fields that will be taken into consideration are related to labour market, life-long learning, social security, health care and quality of life, participation of older persons in social and cultural life. Workshops organized in preparation of the event will help to identify the specific content of each single session.

To achieve such objectives the planning of the event will involve Central Administrations and Public Authorities concerned, and the Coordination of Regions, ANCI and UPI¹¹, in representation of Regional and Local Authorities.

The results of the consultation, to be held under the meeting, will be the subject of an addendum to this Report, which will be prepared during the second half of 2012.

⁸ Ministero del Lavoro, della Salute e delle Politiche Sociali, ISFOL, *Reporting on National Follow-up to the UNECE Regional Implementation Strategy (RIS) of the Madrid International Plan of Action on Ageing (MIPAA)*, November 2008.

⁹ United Nations Economic Commission for Europe, *Guidelines for Reporting on National Follow-up to the UNECE Regional Implementation Strategy (RIS) of the Madrid International Plan of Action on Ageing (MIPAA)*, April 2011, Adopted by the Bureau of the Working Group on Ageing.

¹⁰ Decision No. 940/2011/Ue of the European Parliament and the Council of 14 September 2011 on the European Year of Active Ageing and Solidarity between Generations (2012).

¹¹ National Association of Italian Municipalities and Union of Italian Provinces.

3. Review and Appraisal of National Actions to fulfill Commitments of UNECE MIPAA/RIS

3.1. Commitment 1: To mainstream ageing in all policy fields with the aim of bringing societies and economies into harmony with demographic change to achieve a society for all ages.

In Italy, the theme of Active Ageing continues to influence crosswise the political strategies related to employment, education, health, protection and social inclusion. In the absence of a national strategy for gender mainstreaming, we found recent actions and activities of regional programming regarding some of the problems of the elderly population.

Emilia Romagna

Regional Council Resolution, November 22, 2004 n. 2299 – “PAR A Society for All Ages. Regional action plan for the elderly population.”

The plan is essentially an integrated tool and therefore it doesn't belong to any specific area of regional planning (such as the Social and Health Plan or Area Plan), outlines objectives and synergies for the integrated development of all policies. It is not a law, since it was conceived as an interdepartmental instrument to help stakeholders (institutions, social partners and non-profit organizations) to contribute to the improvement of public and private social policies for elderly population. Central to the philosophy of the Plan is the goal of ensuring to all persons the fruition of citizenship rights all life long, achieving the goal of "a society for all ages".

Liguria

Regional Law November 3, 2009, No 48, "Promotion and enhancement of active ageing."

Through this law, the Region intends to enhance the older persons over-sixties, so that they can continue to pursue gratifying projects, socially dignified, endowed with a sense for the community. The rule provides for the promotion of actions aimed at combating exclusion and discrimination of older people and the promotion of their full social inclusion.

This will be done through the planning of coordinated interventions in the areas of social protection, life-long learning and extension of working life, for a gradual exit from the labour market. Measures to encourage the participation of older people in the local community through civic engagement in voluntary work are also included.

Province of Trento

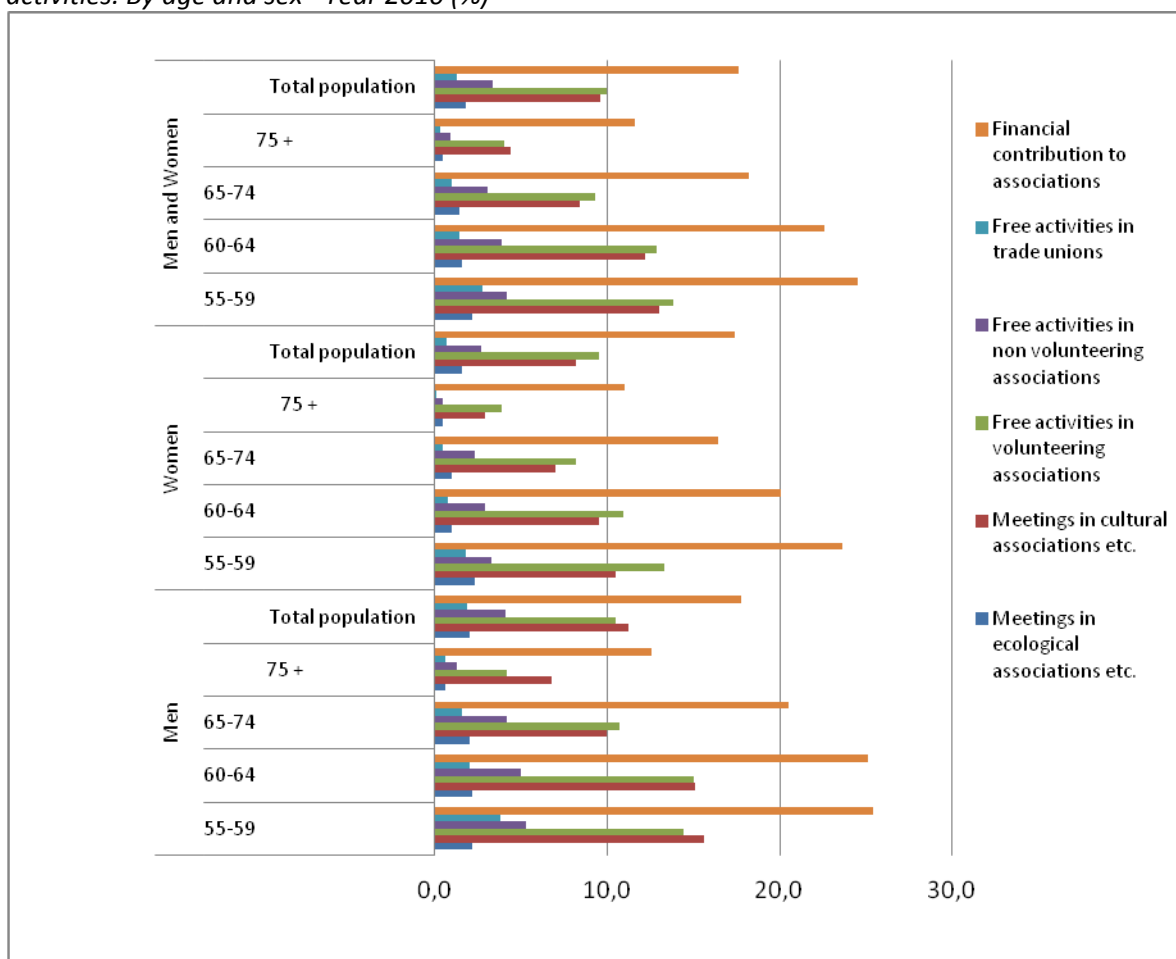
County Law July 25, 2008, No 11, "Establishment of voluntary civil service for the elderly, establishment of the Provincial Council for senior citizens and other initiatives for the elderly."

With this law, the Province of Trento and others local authorities promote the voluntary civil service for the elderly, integrating it with the social services network. Article 2 of the Act provides for the adoption of the "Charter of the elderly rights " that recognizes the dignity of the person regardless of age, ability, production activity and identifies, among the fundamental principles, useful actions to facilitate active ageing.

3.2. Commitment 2: To ensure full integration and participation of older persons in society.

According to the National Institute of Statistics (ISTAT)¹², in recent times, the Italian elderly population shows levels of participation in voluntary associations and in charity work in line with the average of population over 14 years (Figure 1). In particular, meetings with cultural associations and free activities with volunteer associations have higher percentages of population up to 64 years but decline rapidly with advancing age, in analogy to other forms of participation considered. Only financial support to various forms of association remains significantly above the average, up to 74 years of age. Female participation is lower and, in some cases, declines more rapidly after 64.

Chart 1 - People aged 14 and over who during the last 12 months have played at least one of listed social activities. By age and sex - Year 2010 (%)



Source: ISTAT, 2010

Also according to the National Institute of Statistics, the interest in the political debate (investigated by the frequency with which the person has talked about politics in the previous 12 months) reaches its peak, for both men and women, between 45 and 64 (respectively 31.4% of men and 22% of women talk about politics few times a week), and then decline after 65. The gender gap also penalizes women for almost half of the scores in many of the answering modalities.

Similarly, the effective participation in political activities between 45 and 64 years is marked by the intervention to debates, rather than assembly or marches. Largely minority, for both genders, is the financial support to political parties.

¹² ISTAT, *Indagine annuale Aspetti della vita quotidiana*, ISTAT, 2010.

On the institutional side, the Elderly Councils, although less widespread than those for women or immigrants, represent tools of participation at regional, provincial and municipal level. Among the goals established for these organizations we found the analysis of living and social conditions or the needs of the elderly population in the city; encourage the participation of its representatives to the definition, planning and development of specific measures which are in charge of Municipal Authorities.

The Elderly Councils have an advisory role in the examination of measures addressed to older citizens and for the definition of objectives and tools to implement them. In particular, they can express opinions and submit statements on the content of administrative acts or regulations. In relation to their purposes the Council can play initiatives to survey phenomena and to organize conferences and seminars on various topics concerning the elderly.

Such bodies may affect on all the patterns that determine the welfare of senior citizens, by offering an integrated approach to face the various issues associated with aging populations, by increasing opportunities for participation and self-realization of senior citizens. They may also increase the community capacity to interact for the welfare of its weaker members through the creation - in terms of culture and values - of a real solidarity between generations.

3.3. Commitment 3: To promote equitable e sustainable economic growth in response to population ageing

Measures to combat poverty

Since the end of 2008 a set of interventions was carried out aimed at combating poverty and social exclusion, which also targeted the elderly population. In particular, we describe the following actions: the Social Card, the Family Bonus, the Electricity Bonus and the abolition of the Municipal Property Tax (ICI) on the place of residence.

Social Card. The Social Card (introduced by Decree Law No. 112, 25 June 2008, ratified by Law No. 133, 6 August 2008) is a magnetic card, funded by public funds and private donations, distributed by the Italian Mail Company, which gives poor people the opportunity to make purchases in partner shops or pay utility bills.

The Social Card, which entitles to a monthly expenditure of 40 euro, is addressed to persons over 65 and children under 3, who live in households with an income and an ISEE¹³ very low (for the measures subject to ISEE see Commitment 9). Elderly beneficiaries must have a pension lower than 6,000 euro (8,000 if aged 70 years or more), their ISEE must have a value lower than 6,000 euro, they should not be owner of more than one house and have a financial holdings lower than 15,000 euro.

Trough November 2009 the program numbered 780.000 information letters, sent to potential beneficiaries, and 830.000 requests for assistance received. Among 627.000 applications approved, 364.000 were related to recipients aged over 65.

The Social Card program has supported similar measures already taken by regional and local administrations helping to stimulate further experiments. According to the analysis conducted by the Commission of Inquiry on Social Exclusion, the impact of the social card reduces the spread of absolute poverty of Italian households by 4.27% to 4.1%: it was expected that about 40,000 families in a million could come out from absolute poverty¹⁴.

Family Bonus. The "Extra bonus for families, workers, retirees and non autonomous persons" (introduced by Law 29 November 2008, No. 185), is designed to support the income of households composed by

¹³ ISEE: Equivalent Economical Situation Indicator

¹⁴ Commission of Inquiry on Social Exclusion, *Rapporto sulle politiche contro la povertà e l'esclusione sociale - Anni 2008-2009*, November 2009.

employees and retirees. The admission requirement is to receive an income from employment or pension¹⁵.

According to projections prepared in 2009 by the Commission of Inquiry on Social Exclusion, more than 50% of beneficiary households would have a breadwinner retired and only 28.6% a breadwinner employee. Despite a substantially equal division between North and South, the average amounts of the bonus are higher in Southern Italy and in the major Islands, because of a greater spread of families applicants different from the typology "retired alone".

This would lead to a breakdown of spending by 47.4% in the South, 34.4% in the North and 18.2% in the Centre. According to these projections, this measure should lead to a reduction of the ratio of poverty of about 0.32%, or rather about 76.800 families should come out of poverty.¹⁶

Electrical Bonus. It is a measure introduced in 2009 in order to reduce expenditure on electricity rates for households with greater economic hardship. According to the projections, the householder under the age of 30 should have been more likely to receive the bonus, although representing a small part of total beneficiaries.¹⁷

In turn, the age group 51-65 showed a probability of almost 13%, while representing 19.2% of the beneficiaries. The gap was more pronounced for the persons over 65 which, although representing 33.5% of potential beneficiaries, had a chance to have access to bonuses equal to 17.4%, essentially same as the average of the total population. By virtue of the low amount expected, the measure is still considered to have a limited impact on poverty reduction.¹⁸

Abolition of Municipal Property Tax on main place of residence (ICI). In general, the abolition of this municipal tax has favored the middle and high income classes, because among the lowest deciles of income home ownership is less diffused, while rental is more common. Given that in 2007, only 12.8% of the approximately 8 million elderly households with persons aged 65 and over (14.7 million individuals), were living in rented houses, it is reasonable to assume that the measure would have involved over 65 people to a greater extent than the younger age classes¹⁹.

On the side of measures aimed at combating the employment crisis, it must be remembered that the reduction in the employment rate has hit above-average younger workers, so that 82% of lost jobs regards persons under 40²⁰. According to the Commission, the action of social safety nets, would have reduced the risk of falling into poverty by 38%, in case of younger age classes, while the percentage would rise to 85% between 45 and 54 and to 71% for the class 55-64²¹.

In 2009, data confirm the increase in the incidence of "absolute poverty"²² even among households with an elderly, especially when he/she is the breadwinner. In this case, the incidence of absolute poverty is equal to 5.5% and rises to 6.4% if the elderly person is the only member of the family²³.

Among elderly, the incidence of "relative poverty"²⁴ is equal to the national average (13.1%), but they represented 18.7% of the poor in 2008 and 19.4% in 2009 (1 one million 515 thousand persons). In the

¹⁵ Ibid.

¹⁶ Ibid.

¹⁷ Ibid.

¹⁸ Ibid.

¹⁹ ISTAT, *L'accesso alla casa d'abitazione in Italia: proprietà, mutui, affitti e spesa delle famiglie*, Hearing of the President of the National Institute of Statistics, Louis Biggeri at the joint committees of the Senate "Economic Planning, Budget" of the Chamber of Deputies' Budget, Treasury and Planning", Rome, July 17, 2007.

²⁰ Commission of Inquiry on Social Exclusion, *Rapporto sulle Politiche contro la Povertà e l'Esclusione Sociale - Anno 2010*, July 2010.

²¹ Ibid.

²² Absolute poverty is calculated by ISTAT on the basis of a poverty line that corresponds to the minimum monthly expense necessary to acquire the basket of goods and services that, in the Italian context, are considered essential to achieve a standard of living minimally acceptable.

²³ Commission of Inquiry on Social Exclusion, *Rapporto sulle Politiche contro la Povertà e l'Esclusione Sociale - Anno 2010*, July 2010, cit.

²⁴ The relative poverty line for a family of two components, in Italy, is equal to the average monthly spending per person, which in 2009 was 983.01 euros.

North, over 17% of the poor is old (compared with 12% in the South), confirming that the poor of the South are younger: in fact only 18% of them are over 64²⁵.

The latest economic package, prepared by the Council of Ministers of 5 December 2011, reintroduced a property tax on the main place of residence.

Macroeconomic policies

As discussed in Section 1.3, the Euro Plus Pact demand to EU Member States a renewed effort for a closer coordination of economic policies for competitiveness and convergence²⁶. The participating Member States commit to take all measures necessary to achieve the objectives set out in the Pact: boosting competitiveness and employment, supporting public finances, strengthening of financial stability.

In the National Reform Program (NRP) have been identified eight areas of policy, whose contents of intervention are described below.

Work and Pensions. The first area of intervention includes measures designed to increase the rate of labour force participation (especially young women) and measures aimed at adjusting the salary increases to productivity by redefining new rules of collective negotiation among social partners.

Products market, competition and administrative efficiency. The second area of intervention includes a series of measures to promote the free market and to facilitate the conduct of business activities.

Innovation and human resources. The third area contains a set of measures aimed at promoting and strengthening innovation, and to improve and upgrade the education system.

Enterprise support. The fourth area contains measures to reduce the cost of use of technology by companies and remove barriers to entry into the market.

Federalism. The fifth area of intervention is fiscal federalism. This reform, as was already stated, has the objective of introducing a public spending based on standard costs and requirements, oriented towards efficiency of local spending, through the transition from a system of derivative finance to a system of autonomous finance, no longer based on state transfers but rooted on local taxes and partnerships (transfer of state assets to local authorities).

Energy and environment. These measures include the use of tax incentives for the replacement of vehicles with a high degree of pollution and for the energy upgrading in public and private buildings. In addition, we remind the measures already approved under the NSRF 2007-2013 (EU priorities 2020), for energy and climate, and those directed at monitoring and reducing greenhouse gas emissions and promoting solar energy.

Infrastructure and development. This area includes the Strategic Infrastructure Plan, the Housing Plan, aimed to increase the capital of public residential housing, and the National Plan of Logistics, with particular reference to the port system and road transportation (including the resources NSRF 2007-2013 and EXPO 2015).

Hold down of public spending. Based mainly on a more efficient monitoring of public finance as well as on the containment of health expenditure (see the State-Regions Agreement, 3 December 2009, and Decree Law No. 78/2010), by reducing spending on personnel and on pharmaceutical products. The area also includes norms aimed at the competitive management of local public services through their liberalization, consistently with the characteristics of accessibility and universality of the services concerned²⁷.

The Decree Law 138/2011 brought forward to 2012 the measures contained in the Internal Stability Pact 2012-2014 involving Regions, Provinces and Municipalities over 5,000 inhabitants²⁸.

²⁵ Commission of Inquiry on Social Exclusion, *Rapporto sulle Politiche contro la Povertà e l'Esclusione Sociale. Anno 2010*, cited above.

²⁶ Ministry of Economy and Finance, *Documento di Economia e Finanza 2011 – Sezione I Programma di Stabilità per l'Italia*, Rome, April 2011.

²⁷ Ministry of Economy and Finance, *Nota di aggiornamento del Documento di Economia e Finanza 2011*, september 22, 2011.

²⁸ *Ibidem*, Decrees Law 78/2010 and 98/2011.

3.4. Commitment 4: To adjust social protection systems in response to demographic changes and their social and economic consequences

On the basis of data provided by ISTAT and the National Social Security Institute (INPS), in 2009 the total annual amount of pension social security paid in Italy amounted to 253.48 billion euro, a value corresponding to 16.68% of gross domestic product (GDP). The total expenditure increased by 5.1% over 2008, while the share of GDP grew by 1.3 percentage points over the previous year.

In 2009, 23.8 million were paid on pension provisions, for an average annual amount of 10,634 euro.

The number of beneficiaries of pensions was more than 16.7 million, in slight decrease compared to 2008 (-0.27%), with a number of pensions per capita of 1.4. Although the proportion of women is 53%, men receive 55.9% of pension incomes, due to the higher average amount of treatment received (18,029 euro vs 12,597 euro per woman).

70.5% of pensioners are over 64 years. A fairly substantial proportion is constituted by recipients belonging to the age group immediately below the normal threshold of old age: 25.9% of pensioners are in fact aged between 40 and 64 years.

Over the years covered by this Report, an effort of reform went on, which aimed to reach two objectives widely shared at European level: a) gradually raising the retirement age, mostly on a voluntary basis, through the extension of working life and the development of individual private social security, financed with the severance pay (TFR).

Among the measures undertaken in this period, the Law 102/2009 (Article 22-ter, paragraph 2) is to point out. It provides an automatic mechanism by which, starting from January 1st 2015, the age for retirement will be adapted to the increase in life expectancy - determined by ISTAT and validated by Eurostat - compared to the previous five years²⁹. Art. 22-ter, paragraph 1 of the same Law provides, for civil servants women, the gradual increase of age requirement by 5 years for reaching retirement age³⁰.

The following year, the Law No 122/2010 introduced a new system of starting dates for old age and retirement pensions, from 1 January 2011, with a postponement of 12 months for public and private employees and 18 months for self-employed, of the date of achievement of requirements³¹.

The same law established the triennial updating of individual requirements for retirement, in order to adapt them to the increase in life expectancy, as well as the revision of the transitional provisions on the raising of retirement age of workers in the public sector, bringing the age from 61 to 65 years in a single solution (from January 2012).

More recently - given the deterioration of the international economic situation and taking into account the priority needs of achieving the goals of public finance - as established by Law No 111, 2011, "Urgent measures for financial stabilization" (Decree-Law 98/2011), a contribution of equalization³² will be due on the of pensions whose amounts are greater than 90,000 euro (gross per annum), equal to 5% of the exceeding amount up to 150,000 euro, and 10% for the portion exceeding 150,000 euro (with effect from 1 August 2011 to 31 December 2014)³³

²⁹ INPS, *Rapporto annuale 2010*, Rome, May 2011. In the first phase of implementation, the increase in the retirement age, related at the first five years, can not exceed three months.

³⁰ In compliance with the judgment of the Fourth Chamber of the ECJ C-46/07 of 13 November 2008.

³¹ The old age pension (pensione di vecchiaia) is addressed to the persons that have reached the limits of age or service. Until 2011 there was an alternative to this kind of pension, the retirement pension (pensione di anzianità), which could be achieved through a combination of age and seniority. Now all the pensions are old age pensions but there is still the possibility of early retirement with an economic penalty, if a worker has a certain number of years of contribution.

³² Paid by Institutions handlers of mandatory forms of social security

³³ For the years 2012-2013 the indexation of pensions exceeding five times the minimum INPS has been also frozen, with certain exclusions; in the same norms there was also a further postponement of the starting of pensions, up to 3 months, for those who will have 40 years of contributions in 2012, while further delays are planned for schools and university staff.

Due to the further worsening of the Italian economic situation, a new economic intervention "More urgent measures for financial stabilization and development" (Law 14 September 2011, No 148) was launched in September 2011, which provides, starting from 2014, for the 'gradually increasing of retirement age of women in the private sector. The increase will be of one month each year, to be completed in 2026.

In November 2011, the "Stability Law for 2012" (Law 12 November 2011, No. 183) has finally provided a minimum age for accessing to old age pension (at least 67 years starting from 2026), subject to the existing legislation on the starting of pensions benefits and to the adjustment to the increase in life expectancy. The same rule also provides for the compulsory dismissal, for redundant civil servants who reached 40 years of contribution.

Being abolished the minimum pension by the contributory scheme, pensioners over 65 in poor conditions are entitled to a guaranteed minimum income, on the basis of a combination of interventions related to the social protection system³⁴. It should be noted, in relation to health and safety at work issues, the entry into force of Legislative Decree, April 21, 2011, No 67, laying down rules on the access to early retirement for workers engaged in strenuous tasks.

According to the Decree, the workers engaged in very heavy tasks (Decree of the Minister of Labour and Social Security, May 19, 1999) and some categories of night workers may exert the right to have access to the early retirement, having 35 years of contribution and taking into account retirement norms in force at the time of the achievement of requirements.

According to the Ministry of Economy, the measures enforced between 2004 and 2010 should lead to structural effects reducing the incidence of pension expenditure, relative to GDP, of about 0.2 points in 2015, up to about 0.5 in 2030 and then around 0.4 points in 2040³⁵.

Specifically, the reform measures should lead to a reduction in the incidence of pension expenditure to GDP of about 1 percentage point per year between 2015 and 2035. The whole complex of reforms should lead in the whole period 2015-2035 a cumulative reduction of about 26 points in 2050, and nearly half would be ascribed to the interventions of 2010³⁶.

The latest economic package in order of time, launched by the Council of Ministers of 5 December 2011, has finally made the following additional changes to those already established by law (starting from January 1, 2012):

- extension of the contributory system to all workers;
- increasing of the old age pension retirement for men, both in the public and private sector (age 66 from 2012);
- increasing of the old age pension retirement for women in the private sector (age 62, 63 for self employed workers and 66 for both men and women from 2018);
- abolition of quotas and exit windows (pension will start the month after reaching requirements
- retirement pension after 41 years and 1 month of contribution for women and 42 years and 1 month for men; abolition of retirement pension from 2012;
- disincentives to retire before requirements;
- flexible exit from 62 to 70;
- 60 years old women with 20 years of contribution on 31 December 2012 will retire at the age of 64.

For the biennium 2012-2013 has been also adopted the block of the revaluation of pensions to inflation, for benefits over 1,402 euro in 2011.

Finally, the Ministerial Decree, March 28, 2011, establish the organizational model called "Integrated Polo of Welfare" (under the Law 247/2007, known as the "Protocol of Welfare)." As a result of the decree will be constituted, at provincial level, integrated centers in which will be placed the local offices of the Ministry of Labour and the provincial offices of the Public Pension Institutions. Citizens will have the opportunity to

³⁴ Ministry of Economy and Finance, *Le tendenze di medio-lungo periodo del sistema pensionistico e socio-sanitario - 2008*, Report n. 10, Rome, 2008.

³⁵ Ministry of Economy and Finance, *Documento di Economia e Finanza 2011 – Sezione I Programma di Stabilità per l'Italia*, Rome, April 2011.

³⁶ Ibid.

address at unique locations, where they can benefit from public services relating to labour market policies, the protection of working conditions, social security and assistance.

3.5. Commitment 5: To enable labour markets to respond to the economic and social consequences of population ageing

In the period under consideration, interventions which may involve the older portion of population in working age, were concentrated in the implementation of the new legislation on health and safety at the workplace, which came into force in 2008, providing specific obligations for both workers and employers; in adopting specific measures aimed to limit the effects of the crisis on labor supply; in liberalizing the intermediation between demand and job supply.

Between the end of 2008 and the beginning of 2009, following the guidelines of the European Commission³⁷, the Government and the Regions have launched a number of measures mainly based on a widening of the range of workers recipients of unemployment benefits and a higher integration between active and passive employment policies.

The joint action of the Central Government and Regional Administrations was ratified by the State-Regions Agreement of February 2009, in which the commitment at funding the various measures was defined, for the first time using the resources from the European Social Fund (ESF), combining income support with active labour market policy measures.

The financing of anti-crisis interventions, as contemplated in the Agreement, has been partially supported by the Regions up to 30%, mainly through the ESF resources (2.1 billions), used to enhance the Extra income redundancy fund (*Cassa integrazione guadagni, or CIG*) and mobility allowance (*Mobilità*) measures provided by the State through INPS and to support active policy measures directed to the same recipients of income support³⁸.

The following year, among the actions undertaken by the Government within the *Finance Act 2010*³⁹ and in the following corrective action⁴⁰, additional incentives have been included, in favor of older workers at risk of firing, including:

- the financing of social security contributions of companies hiring workers over 50 entitled to unemployment benefits;
- the financing of pension contribution, for employees (with 35 years of contribution) receiving income support and accepting a reasonable offer of work implying a lower salary (at least 20%) until reaching the requirements for retirement;
- further extension of economic sectors and companies receiving income support measures for workers;
- incentives to private employment agencies for the placement of disadvantaged workers (under Regulation CE/800), including over 50;
- the extension, to public institutions of the use of work vouchers;
- incentives for full-time hiring of workers receiving unemployment benefits;
- the reintroduction of “staff-leasing”, previously cancelled;

On the side of job protection, in 2009 and 2010 the Government extended the social security benefits to non-standard workers (fixed term contracts, project workers etc.) and decided for a non recurring

37 Communication *From financial crisis to recovery* (with EC 29.10.2008 No 706) and *A European Economic Recovery Plan* (COM EC No 800 of 26.11.2008)

38 ISFOL - Italia Lavoro, *Ricognizione delle misure regionali di contrasto alla crisi occupazionale: 1. Analisi Trasversale, presentato il 28 maggio 2010 al Sotto Comitato Risorse Umane del QSN 2007 - 2013*, the report is published on the website of the Ministry of Labour and Social Affairs

39 Law n. 191, December 23, 2009

40 Law n. 122, July 30, 2010, conversion of the D.L. , May 31, 2010.

allowance addressed to people hired with collaboration contracts (see the same State-Regions Agreement of February 2009, further renewed in 2010).

The extension of welfare support provisions has been coupled with the implementation of a database of recipients of public income support. The effort towards the fulfillment of the labour market reform, which had started in the late 1990s, has led the Government to launch, in July 2010, the Three-Year Plan for Employment. The plan was submitted to the social partners with the aim of formulate agreed assumptions on labour market reform, and was organized around three key priorities⁴¹:

- emersion of the informal economy and fight against irregular employment;
- higher labour productivity through mutual adaptation of workers and enterprises (via local negotiation, bilateral management of employment services, wage increases depending on performance and profits of the company);
- employability of workers through the development of skills required by the labour market, with special emphasis on young people and women.

Among the measures included in the budget Law (Law July 15, 2011, No 111, Conversion into law with amendments of Decree-Law July 6, 2011, No 98), we point out the complete deregulation of job placement (the possibility to carry out intermediation is now allowed to high schools, public and private universities, Municipalities, main associations of employers and workers, charitable organizations, bilateral and non-profit organizations, managers of non-profit Internet websites, the National Order of Labor Consultants).

The provisions for employment included in Title III of Law September 14, 2011, No 148 (conversion of Decree 13 August 2011, No 138, for collective labor agreements signed at company or local level by the most representatives trade unions), give the possibility of signing agreements on matters pertaining to the organization of work and production, which could potentially be used in support of age-management practices.

Lastly, the Stability law for 2012 (Law 12 November 2011, No. 183) introduced the use of facilities for job placement contracts (*contratto di inserimento*) for women workers of all ages and further facilitated the use of part-time and teleworking for people with disabilities and workers under *mobilità* measures. The same provision further extended beneficiaries of social safety nets, as well as the continuation in 2012 of the actions of income support. Charges resulting from these measures shall be borne by the Social Fund for Employment and Training, refinanced with 1 billion euro for 2012.

In terms of active policy measures, core competences of Regional and Provincial Administrations, surveys has revealed that all ESF Operational Programs 2007-2013 deal with such issues. In some cases the topic is also reported in the annual and/or long-term programs for training and work, formulated by the Regional and/or Provincial Administrations, as well as in Single Programming Documents⁴².

Analyzing the expenditure forecasts contained in the Regional Operational Plans for 2007-2013, it appears that for measure number 67, aimed at encouraging active aging and extending working life, the budget allocated in Italy amounted to 283,282,563 euro, 2,4% of ESF available resources, which amount to 12,048,613,607 euro, planned for all the categories of intervention dedicated to the priorities of the Lisbon Strategy.

Resources available under measure n. 67 also show significant variation from region to region, if compared with the national average. Whereas in Convergence Regions they go from 1,3% (Sicily) to 3.1% (Campania), in Competitiveness and Employment Objective Regions, the range is wider and goes from 0.5% in Molise to 5.9% in Tuscany. In total, the Regions where the estimated expenditure exceeds the national average are 8 (Abruzzo, Campania, Lazio, Liguria, Marche, Puglia, Tuscany and the Autonomous Province of Trento), while in the rest of the Country, the impact for the budget of specific measures for ageing, stands at lower rates.

Considering the typology of interventions it is clear that older workers are a priority target group also for projects funded by regional ESF measures. These include the development of services for matching between demand and labor supply and the development of active labor market policies designed to

⁴¹ Ministry of Labour and Welfare, *Piano triennale per il lavoro. Liberare il lavoro per liberare i lavori*, July 30, 2010.

⁴² ISFOL, *Le azioni locali a supporto del prolungamento della vita attiva*, ISFOL, The Books of the European Social Fund, Rome, to be published

strengthen the skills of older workers (over 45 and over 50) promoting their integration into the labour market. According to surveys, almost 90% of the interventions are aimed at enhancing employability/adaptation of workers and facilitating job search⁴³.

3.6. Commitment 6: To promote lifelong learning and adapt the educational system in order to meet the changing economic, social and demographic conditions

The percentage of the adult population (25-64 years) participating in training activities and/or education in Italy remains at a lower rate to the average of European countries (EU15), covering around 6% compared to 10,6% in Europe. If we consider the age factor in particular, the older segments of the population (35-64), are less involved in training, so the participation decreases as age increases. In the older population (55-64 years) the percentage drops to 2.2 %, reaching only half of the corresponding European average and almost four points below the national average, although with a slightly positive trend in recent years.

Table 4 - Participation in training and/or education by sex and age, and comparison with the European average (%)

		2007	2008	2009	2010
25-34	Men	11.7	11.6	11.7	12
	Women	14.1	14.1	13.8	13.9
	Total	12.9	12.8	12.8	13
35-44	Men	4.9	5.5	4.8	5
	Women	5.7	5.7	5.3	5.5
	Total	5.3	5.6	5	5,3
45-54	Men	4.2	4.4	3.7	4.1
	Women	4.2	4.3	4.3	4.5
	Total	4.2	4.4	4	3
55-64	Men	2.2	2.2	2.2	2.5
	Women	2	2.2	2.4	2.6
	Total	2.1	2.2	2.3	2.5
EU 15	25-64	10.7	10.8	10.7	10.4
	55-64	5.6	5.8	5.8	5.5
Italy	25-64	6.2	6.3	6	6.2
	55-64	2.1	2.2	2.3	2.5

Source: Eurostat 2011

Despite a slight improvement between 2007 and 2008, participation in learning activities suffers a decline in subsequent years, with different trends in relation to age: while between 35 and 44 years, the trend had a slight recovery after 2008, participation suffers a sharp fall in the population between 45 and 55 years of age, presumably in the second stage of career and it goes down almost one and a half until 2010.

Finally, in the age group that identifies the people closest to retirement, while still being critically low the level of life-long learning, participation in learning activities assumes a pattern of steady and gradual increase over time.

⁴³ Ibid. They are mainly training courses and continuous learning for the upgrading of skills (through incentives to individuals for training), economic incentives for companies to recruit mature workers to facilitate the matching between demand and supply work of integrated pathways for reintegration into the labor market of disadvantaged people (thanks to the involvement of the Employment Services).

Adult education

In June 2009 the Government provided a Scheme for a Regulation which lays down general rules for the redefinition of the organization and didactic offer of Adult Education Centers (CTP)⁴⁴. The scheme provides for the unification of the existing structures (CTP and secondary evening schools) in the Provincial Centers for Adults Education (CPIA), giving priority to disadvantaged users⁴⁵.

In order to facilitate the access to education in adulthood, the reorganization provide to link the centers into local networks at provincial level, with autonomous⁴⁶ organizational and educational arrangement, that follows the parameters provided for high schools.

The centers provide shortest and more essential paths than ordinary, organized in two educational levels and structured in 2 and 3 years courses, respectively. Taking into account the characteristics of adult learners, activities of counseling for the recognition of credits and skills from formal and informal learning are provided. Starting from these activities an 'individual training pact' is stipulated, allowing to customize the learning process. Distance learning is also part of the offer, for no more than 20% of the total number of hours. Following a Parliament first opinion, the regulation is currently under revision.

With regard to the identification of a system of certification of adults skills, the Italian system currently lacks a national qualifications framework (NQF), and national standards for VET, with particular reference to the outcomes of non-formal and informal learning. However, in addition to the provisions introduced in the Regulation on the CPIA, the Ministry of Education is dealing with this issue in the context of the 2007-2013 Structural Funds programming period. In this regard, two initiatives are worthy of note, realized in collaboration with the INVALSI⁴⁷ and funded by the National Operational Plan Skills Development in the context of the European Social Fund 2007-2013: the project EDALAB (Diagnostic tools for the detection of incoming and ongoing skills in adult education) and the SAPA project (Systematic detection of functional literacy skills of the adult population in the Regions of Calabria, Puglia and Sicily). The two initiatives are designed to build and disseminate a set of tools to support the personnel of the CTP and the evening schools during counseling of trainees, in order to tailor courses according to their specific needs.

In the period under consideration, one of the instruments used for the development of life-long learning is the Life Long Learning Program, which in Italy is jointly coordinated by the Ministry of Labour and Social Policies (DG counseling and training policies) and the Ministry of Education, University and Research (DG International Affairs).

In particular, between 2007 and 2009, the participation in the *Grundtvig* sub-program which is specifically targeted to adults, promoted measures such as: in-service training, assistance, workshops, study visits and best practices exchange for personnel working in adult education and, from 2009 also Senior volunteering Projects, specifically dedicated to the over 50 volunteers. Also the "Leonardo da Vinci Program" contributed to the development of lifelong learning, especially as regards the testing of systems of

⁴⁴ Ministry of Education, University and Research, Scheme Regulation No. 194, entitled "General Requirements for the reorganization of adult education centers, including evening classes, under 'art.64, paragraph 4, of Decree-law 25 June 2008, No. 112, converted with amendments into Law August 6, 2008, No. 133." The Scheme of Regulation No. 194 has been proposed in the House of Deputies in March 2010.

⁴⁵ The Centres run a training program aimed at achieving qualifications and certifications for the first and second cycle of education in relation to courses of technical colleges, vocational training and schools of art. For this reason, working-age adults, including foreigners, who have not completed compulsory education or who have not qualifications of secondary school can enroll in the courses; those who are at least 16 years old, or who have not completed compulsory education or who do not possess the qualifications end of the first cycle of education can also enroll.

⁴⁶ The CPIA have the same autonomy given to schools in the Decree of the President of the Republic March 8, 1999, No 275; they have their own staff, they have the same collective bodies of educational institutions, with the adjustments provided for in Article 7, paragraph 1, taking into account the particular nature of the users, they are organized in order to establish a close link to local authorities, the world of work and occupations; they make an educational offer structured by levels of learning.

certification of skills and exchange of good practices (for example Elderly Consortium, experimentation of a system of certification of skills for personal care workers).

Life-long learning and employability

The aforementioned Framework Agreement between the State, Regions and Autonomous Provinces, signed on February 12, 2009 to address the economic crisis, has started a process of reorganization of labor and training policies and has placed the issue of learning and skills development of human capital at the core of the policies for economic development.

Training and active labour market policies play a key role in regional interventions within the National Program to support income and skills of workers hit by economic crisis. It represents the implementation of the framework agreement of 2009, and of all the anti-crisis measures adopted with the Decree-Law n. 185/2008 (so-called anti-crisis Decree), ratified by Law n. 2/2009. The Program developed in a set of regional action plans, is designed to support the employability of workers hit by the crisis (unemployed and workers in CIG or *mobilità* measures) with a combination of active and passive policies.

In particular, Article 1 of Law 2/2009, establishes the strengthening of social safety nets on an experimental basis, in order to safeguard the human capital of enterprises, promoting the reintegration of workers under CIG measures through their participation in training and requalification projects⁴⁸.

The strategy adopted in 2009 was confirmed by a second agreement between the State and the Regions April 20, 2011, with an enrichment of active policies (see Commitment 5).

The budget from the Central Government is 1 billion euro for income support in addition to 600 million residual from the previous two years, while the Regions will contribute with 2.2 billion euro.

Following anti-crisis measures, on 17th of February 2010, the Government, the Regions and the social partners signed a pact aimed at sharing Guidelines for Training, in order to agree on the criteria for the resources allocation of training of unemployed and workers under CIG.

The agreement is based on three assumptions: work is an essential part of the educational, training and professional career of a person; the workplace is the most suitable environment for the development of expertise; formal certification must depend on the real test of a person's skills, gained through work and experience, regardless of attended training courses, which are at most the mean and not the evidence for skills acquisition and development. In relation to these assumptions, the guidelines propose a set of measures, among which the following are related to the subject of this report:

- use a skills centered learning method, in opposition to a scholastic one, organized around separate disciplines, and reinforcement of technical education and vocational training; testing of the "citizen's training booklet" for the certification of informal and non formal skills, following a "substantial" certification approach;
- access for unemployed to traineeship in higher education and technical training (IFTS) and apprenticeship, giving priority to the on the job training;⁴⁹

⁴⁸ The course of the action proposed by the regional anti-crisis action plans, provides the sign of a Action Plan for the individual beneficiary, in relation which the recipient receives a personal attribute of activation, ie a "virtual" credit that can be used by single recipient to benefit from services aimed at enhancing the skills possessed (accompanying and guidance to work, apprenticeships and internships, balance and validation of the budget skills, training courses in the catalogue, or bended for the qualification or retraining on the job, refresher and retraining courses that a or technological innovation and organizational). The delivery of these services is also integrated in a set of measures of income support (benefits in favor of the suspended employee), and facilities for companies (hiring bonus, service vouchers) in order to acquire training and consulting services aimed at the reorganization of production, at the introduction of innovations, at the internationalization, benefits for the employee.

⁴⁹ The opportunity for companies that have workers under CIG measures, to involve such workers if beneficiaries of income support, for 2009 and 2010, in training and retraining projects, which may also include production activities, as long as connected to learning programmes, was established by the Interministerial Decree of 18 December 2009,

- adult education by means of:
 - a) on the job training agreements for anticipated reintegration of workers under CIG measures;
 - b) training programs in the places of production of goods or services even if inactive or within vocational training centers providing the replication of production conditions and periods of work experience in enterprises;
- engagement of inactive workers as tutors in technical and vocational training;
- priority to job placement contract for over 50;
- development of contact and guidance points for workers of all ages, realized in collaboration by the social partners;
- accreditation on a regional basis of independent bodies in charge to certify workers' skills, whatever formally, non formally or informally acquired.

With regard to regional strategies for the promotion of lifelong learning with a view to active aging, as previously mentioned for Commitment 5, between 2007 and 2009, initiatives aimed at promoting the employability and adaptability of older workers account for 83.2% of the measures implemented for this target. In this context, training, and in particular vocational training is one of the types of intervention that has most characterized programs addressed to older population (34.8% of the interventions), followed by work experiences (6.7%), other interventions to improve employability (e.g., geographic mobility, 6.7%) and initiatives for the validation of non-formal skills (4.3%).

Among the instruments of intervention, we report the further extension of the range of action of Joint Interprofessional Funds (Decree-Law No. 138 of August 2011 converted into Law n. 148/2011). The funds represents currently the higher concentration of resources for continuous training of workers, and give priority to projects involving a meaningful number of women workers. Considering the period January 2008 – June 2011, over 50 workers represents 15.5% of their beneficiaries (111,000 employees), with a slight prevalence of men. Unskilled and skilled workers are more represented in 20-34 and 35-49 age classes. White collars and technicians decrease in older classes, while managers show the highest share over 50.

The relationship between aging and the use of new information and communication technologies (ICT) is the subject of the E-Government Plan 2012, launched in January 2009, taking into account that the support to non autonomous elderly should be based on the strengthening of health and social services and home care programs as well as on a real accessibility to new technologies. In this regard, the Plan provides a strong commitment to innovation, the spread of network services, accessibility and transparency of Public Administration. As concerns the problems of older citizens, the most significant projects are represented by the digitization of prescriptions and medical certificates, the Personal Electronic Health Record, the global adoption of certified e-mail for the citizens, the Public Administrations, the enterprises and professionals, up to online payments to the Central Government.

In order to achieve its objectives, the Plan emphasizes the importance of investment in human capital, aiming to reduce the exclusion of disadvantaged social groups and underdeveloped regions, in reference to the use of Internet, the broadband coverage, digital literacy and the accessibility of Web sites.

implementing Article 1, paragraph 3, of Decree-law 01/07/2009, No. 78, converted with amendments into Law 03.08.2009, No. 102.

3.7. Commitment 7: To strive to ensure quality of life at all ages and maintain independent living including health and wellbeing

Health and access to health services⁵⁰

According to ISTAT's⁵¹ data the perception of good health decreases with age. At the same age, there are gender differences in the perception of health status already since 45 years old. In population in general 75% of men have a good health, against a percentage of women equal to 66.5%. Between 65 and 74 years, the distance increases, with 44.6% of men declaring a state of good health, compared with 34% of women. The spread is wider, albeit reduced, above 75 years, with 27.6% of men and 18.6% of women declaring a state of good health⁵².

The most common diseases in the ultra-sixty-five are osteoarthritis and arthritis, reported between 65 and 74 years from 33.3% of men and from 52.2% for women (the percentage rises to 49.6 and 67.9% respectively over 75 years). Followed by hypertension (42.1% and 45.7% respectively between 65 and 74 years, and 48.8% and 54.5 for people aged over 75) and only for women, osteoporosis. The percentage of these diseases is significantly higher than the corresponding values for the general population⁵³.

In 2009 there were fewer hospitalized older adults in absolute value (3,190,247 compared to approximately 3,600,000 in 2006), but an increase in their percentage on the total (from 40.4% in 2006 to 42.1). The hospitalization of people aged 65 and over are those of longer duration (equal to 7.8 and 9.1 days respectively for the two classes 65-74 and 75 +). Although this period is shorter, if compared to previous data, it is always longer than that of the total population (6.7 days).

The diseases for which people over 65 are more frequently hospitalized are those of the cardiovascular system (19.8% of total), showing a prevalence of men, with a rebalancing in older classes. In the second place we find the diseases of the musculoskeletal system and connective tissue (13.0%), where, however, ratios are significantly reversed in favor of women, and maintain this discrepancy with increasing age. These are followed by, diseases and disorders of the nervous system and those of the respiratory system (9.4%).

On the prevention side, the Ministry of Health, in collaboration with the Institute of Health (CNESPS) and the Umbria Region, in 2008 started a study called "Silver Steps", which aimed to test and then fully implement, along with the Italian regions, a methodology for epidemiological surveillance on the health and quality of life of older people⁵⁴.

The project is based on the methodological approach suggested by the World Health Organization in relation to monitoring the quality of aging. During the first two experiments conducted in 2009 and 2010, the survey covered approximately 10,000 over 64 years old people in 18 Italian Regions. The results of this activity represents a first attempt to structure an oversight of the conditions of active aging population, able to provide timely and easily to use information on the health and on the "answers" provided by the services. The project is currently being implemented nationwide under ISS/CNEPS coordination.

Long term care

The forms of assistance planned for chronic not self-sufficient patients are:

- Home medical assistance (ADP) by general practitioners;

⁵⁰ Ministero della salute, *Relazione sullo stato sanitario del Paese 2009-2010*, Roma, dicembre 2011.

⁵¹ Istat, *La vita quotidiana nel 2009*, Istat, 15 march 2011

⁵² Ibid.

⁵³ Ibid

⁵⁴ Baldi A, De Luca A, Cristofori M, et al. *PASSI d'argento: i risultati della prima indagine multi regionale*, Not ist Super Sanità 2010 23 (5).

- Home care service for patients living in nursing homes and communities (ADR);
- Integrated Home Care (ADI) to meet the complex needs of people who require a continuous health and social care; it provides a continuous delivery of health care services (medical, nursing, rehabilitation), social assistance (personal care, meal delivery, housework), by various personnel who works in team.

In 2008 the percentage of persons 65 and over who used home health care amounted to 3.3%. Between 2001 and 2008 this share increased by more than a point, with a greater increase in Northern and Central Italy (+1.4 points) in comparison with the South (+1.1)⁵⁵.

According to 2009 data from the Ministry of Health, persons over 65 are the major group benefiting from home care, with peaks of 91.7 and 90.6 in Liguria, Emilia-Romagna. The Southern Regions, on average, provides less assistance to elderly population⁵⁶.

Hours of care provided are an average of 19.2 by-case, a slight decrease compared to 2007. They vary greatly from Region to Region (from a maximum of 66 hours in Valle d'Aosta to a minimum of 6.4 in Friuli-Venezia Giulia). It is confirmed that the nurse is the professional who is more involved in the service delivery.

In this context, the Ministry of Health promotes, among others, the initiative "System actions and technical assistance to service objectives - ADI project", under the National Strategic Framework (NSF) 2007-2013. The general objective of the project is to support Southern Regions in strengthening home care services to the elderly population over 65. The focus of the project is the integration among health services provided by Health Districts with social services provided by Local Authorities.

Another major area of Long-Term Care are nursing and rest homes. Homes and communities surveyed in 2009 by the Information System of the Ministry of Health were 162,590, giving hospitality to a population of 237,000 people, for a total of over 53 million days of care and an average of 224.7 days per user. Both the number of places and the people were significantly higher in Northern Regions, with Lombardy in the first place.

Regional rehabilitation services shows the highest offer for the elderly (4.9 services per 100,000 inhabitants, 237.7 residential beds and 15.5 semi-residential beds), followed by psychiatric health services (3.6 services per 100,000 inhabitants, 26.2 residential beds and 17.6 semi residential beds). Services addressed to persons with physical and mental disability are scarcer⁵⁷.

Lombardy and Emilia Romagna are significantly above the average for services for the elderly and persons with physical disabilities, while as much as 10 Regions (Marche, Lazio and all Southern Regions) are characterized by a consistent offer of rehabilitation services, which is counteracted by a scarce supply of local services and residential care for the elderly⁵⁸.

The total public expenditure for LTC amounts to 1.9% of GDP in 2010, of which about two thirds devoted to persons over 65⁵⁹. The health component is 46.4% against 43.3% devoted to care allowance (*indennità di accompagnamento*)⁶⁰. Other welfare benefits cover however about 10.3%. This expenditure is 0.86% of GDP and is 12% of the total health expenditure⁶¹.

⁵⁵ Istat, *Noi Italia*, Istat, march 2010

⁵⁶ Ministero della salute, *Relazione sullo stato sanitario del Paese 2009-2010*, cit.

⁵⁷ Istat, *La dotazione di infrastrutture e servizi nella sanità. Anni 2004-2005*, Istat informazioni, n. 8 2009.

⁵⁸ Ibid.

⁵⁹ Ministero dell'Economia e delle Finanze, *Le tendenze di medio-lungo periodo del sistema pensionistico e socio-sanitario, Previsioni elaborate con i modelli della Ragioneria Generale dello Stato aggiornati al 2011*, Rapporto n 12- Anno 2011.

⁶⁰ Ibid. The health component of LTC spending includes all the healthcare benefits provided to non autonomous workers because of aging, chronic illness or mental limitations, need ongoing assistance. In Italy, this component includes local as well as assistance for the elderly and disabled (disjointed in outpatient and home care in the semi-residential care and residential care), psychiatric care, the assistance given to alcoholics and addicts and hospital care provided under long-term care. The attendance allowance is a monetary benefit paid to civil invalids, blind and deaf-mute persons, depending only on psycho-physical conditions of the subject.

⁶¹ Ibid.

The number of allowances paid at the end of 2010 was approximately 1,800,000, with a budget amounting to about 0.8% of GDP. 91% of the benefits were provided for persons with disabilities⁶².

Remaining LTC measures represents a heterogeneous set of services, mainly in kind, provided locally with social care purposes targeted at disabled and non autonomous elderly. In 2010, overall public spending for LTC, without health care and allowances, was estimated 2.9 billion euro (0.2% of GDP), 61% of which related to non-residential measures, 23% to residential services and remaining 16% to cash benefits⁶³.

Among the priorities for future action, identified on the basis of available information, there are: the promotion of interventions able of influencing lifestyles and health risks factors; implementing policies to support the active aging of the population, the integration of intervention strategies to answer to the complexity of the multiple needs of the elderly, including procedures for case management and single points of access (PUA) in the Health Districts; strengthening and improvement of home care, residential semi-residential structures; training of personnel.

Many projects which follow this approach are currently under way. They are funded under the research-action promoted by the National Centre for Disease Prevention and Control (CCM) managed by the General Directorate for health prevention of the Ministry of Health. Materials can be found at the following Web site: <http://www.ccm-network.it>

3.8. Commitment 8: To mainstream a gender approach in ageing society

At the national level, we report the establishment of the Committee for women's entrepreneurship (see Ministerial Decree 19 January and 25 February 2009), already provided for by art. 21 of the Decree April 11, 2006, n. 198 (the so-called Code of equal opportunities between men and women). The Committee is charged with planning, coordination, consultation, on measures targeted at realizing positive actions for women's entrepreneurship, also promoting study and research on such topics.

The following year, the Legislative Decree 25 January 2010 n. 5, implementing the Directive 2006/54/EC on equal opportunities and equal treatment between men and women in employment, has made some additional changes to the Legislative Decree 198/2006, and norms concerning the protection and support of motherhood and fatherhood, (Legislative Decree 26 March 2001, n. 151).

In 2011, the National Committee for Equal Opportunities in Employment of the Ministry of Labour and Social Policies has formulated the program for 2011 aimed at increasing women's employment and qualification, eliminating wage and career disparities, fostering the creation and consolidation of businesses run by women, creating projects networking. The program supports positive actions which have, among others, the following objectives:

- to promote the presence of women in executive management positions;
- to change the organization of work, the systems of performance evaluation and reward of the companies;
- to support work initiatives for women with temporary works, or unemployed, facilitating their reintegration through training activities;
- to consolidate businesses run by women or with a prevalence of women;
- to promote the quality of personal and professional life of migrant women workers.

This year the Law 120/2011 has finally come into force; it requires that, like in other European countries, stock companies provide at least one third of the positions in the boards of directors for the less represented gender, since early renewals after August 2012.

As concerns work-life balance, the Law June 18, 2009, No 69 introduced a new regulation implementing the law March 8, 2000, No 53. The new Regulation:

- extended to professionals enrolled in public registers (not just companies) the possibility to

⁶² Ibid.

⁶³ Ibid.

- implement work-life balance measures;
- enhanced parental leave for the care of children, persons with disabilities and other family members with serious illnesses;
- introduced for self-employed workers the possibility to activate both collaborations and replacements to free caring time for minor children or persons with disabilities.

The Fund for Family Policies financed in 2011, with a budget of 15,000,000 euro, projects from companies and social partners aimed at the introduction of new systems of flexible working time and arrangements (such as reversible part-time, teleworking, concentrated time, flexible working time, flexible shift, bank of hours, etc.), programs and activities (including training) for the reintegration of workers coming back from periods of parental leave of at least 60 days, as well networks between Local Authorities, enterprises and social partners for the promotion of innovative services for reconciling work and family life.

On the regional side, in 2009-2010, given an apparently lesser impact of the crisis on women employment, labor market policies specifically addressed to them appear to have been sacrificed in favor of more generalist interventions, in which women are represented just like other subjects⁶⁴. In this scenario, therefore, the only women-friendly policies are precisely summarized in those of work-life balance. This situation was due to two factors that have certainly contributed. On one hand, the management of economic crisis and employment, from a financial point of view, has been devoted to the implementation of the State-Regions Agreement of 12 February 2009. This has probably favored measures applicable to a broader audiences of beneficiaries. On the other hand, these choices were certainly favored by the fact that the structure of the new ESF 2007-2013 didn't provide measures specifically targeted at women. The only once exclusively dedicated to women remained measures addressing the creation of women enterprises, but in a less exclusive way.

Work-life balance shows at present approaches: general agreements concerted at regional level among social partners and NGOs (e.g. Lombardy), the definition of tools such as vouchers, coupons, services (as in the case of Piedmont, Trento, Bolzano, Apulia, Sicily) or direct resources investment on social policies (as in the case of Emilia Romagna or Veneto).

3.9. Commitment 9: To support families that provide care for older persons and promote intergenerational and intra-generational solidarity among members

With regard to the development of family policies and the promotion of solidarity between generations, the National Conference on the Family in November 2010, reaffirmed the intention of the Italian Government to promote the development of policies aimed at developing services that support the different moments of transition that characterize the individual life cycle, promoting the generational exchange and supporting specifically families in caring for their older members.

The intent is to promote an intersectoral approach, fostering networking and subsidiary on the issues of life in common, and to involve families, associations (e.g. the Forum of Family Associations, the Regional Associations of Family Solidarity) and NGOs in the design and implementation of interventions, starting from the experiences already implemented in some Regions on the basis of the measures promoted by the law 328/2000 (framework law for the construction of the integrated system of interventions and social services)⁶⁵. This strategy, based on the development of both a vertical (integration of governance at local,

⁶⁴ Cardinali V. (edited by), *Mercato del lavoro e politiche di genere 2009-2010 Scenari di bienni di crisi*, Ispol, 2010.

⁶⁵ Experimentation of support services for home care and community oriented case management (in Piedmont day care of persons over sixty five by neighbors caregivers or volunteers; in Sicily fosterage for the elderly and intergenerational and mediation services; the one-stop listening and guidance for family members of Alzheimer's patients in Lombardy; the Alzheimer's Caregivers Café Project in Liguria), or cash benefits targeted to households for covering work-life balance needs and elderly family care (0-100 vouchers in Lombardy).

regional and national level) and horizontal subsidiary approach (involvement of local communities, associations, NGOs, etc.) in services design , also answering to public expenditure restructuring in relation to the economic choices made to face the critical current economic situation.

The following table highlights how the economic crisis has gradually raised the need for a reorganization of operations in the field of social policies, and policies in this area for family interventions. In relation to the reform of Title V of the Italian constitution, Regions are now responsible for managing the expenditures on social policies, while Central Government is involved in the definition of the essential levels of service to ensure the enforceability of certain civil and social rights nationwide.

Table 5 - Trend in national funding addressed to Regions for social policies. 2009-2011

Year	National Fund for Social Policies	National Fund for Families	Equal opportunities Fund	Fund for non autonomous persons	Youth Policies Fund	Total
2008	670,797,413.80	197,000,000	64,400,000	299,000,000	-	1,231,197,414
2009	518,226,539.00	200,000,000	30,000,000	399,000,000	-	1,147,226,539
2010	380,222,941.00	100,000,000	-	380,000,000	37,421,651	897,644,592
2011	178,500,000.00	-	-	-	-	178,500,000

Source: Conference of the Regions and Autonomous Provinces, Financial resources of the National Fund for Social Policies years 2004-2011, and of the Fund for Non-autonomous persons. Agreements with the Government, provisions in financial norms and documents of the Conference of Regions and Autonomous Provinces. Interregional Studies and Documentation Centre, 2011

In this situation, during the period covered by the Report, the Government's approach to social policy, and in this context, the policies addressed at families, showed three main pillars:

- to promote a case management approach, integrating social and health services, both horizontally (community oriented) and vertically (integration of national, regional and local levels of governance);
- to promote a comprehensive monitoring of resources to favor integrated planning;
- to identify the essential levels of service, which could make service delivery methodologically uniform, especially with regard to the management of non autonomous persons.

The Italian Regions, considering the current economic situation, on 22 September 2011, proposed solutions for the revitalization of social policies using an horizontal (connecting with the ONGs, social enterprises and voluntary associations) and vertical subsidiary approach (in anticipation of a coming State-Regions agreement). In particular, on the basis of Government guidelines on municipal and regional federalism (Legislative Decrees 216/2010 and 68/2011), the Regions proposed some general objectives for social policies, organized as follows:

- services for first contact and case management by the social services network;
- services and measures for favoring people to remain in their home environment;
- community based services for early childhood;
- residential services for frail persons;
- social inclusion measures and income support.

These general objectives provide actions for supporting families and individuals in conditions of hardship and poverty, support services, home care for non autonomous persons, residential solutions for those are without family support.

The hypothesis of single social fund is currently under discussion with the Ministry of Labour and Social

Policies, also reconsidering the relationship between social spending and the Stability Pact.

Elderly people and Social Services

The evolution of social services spending by Local Authorities gives an idea of the Italian commitment in addressing elderly people needs⁶⁶.

In 2008, the total expenditure on local social services amounted to 6 billion and 662 million euro. Family and children, the elderly and persons with disabilities were the main recipients of the services: on these three areas it was concentrated 82,6% of the resources. Considering the period of time ranging from 2006 to 2008, total social spending per capita has increased by about 10 points, in line with the trend to a slight and continuous increase observed since 2003, the first year in which the survey was conducted. However, the share of the services for the elderly population, while representing the second area of investment after the family, until 2008, has experienced steady decline from 23% to 21% of the total.

In particular, in 2008 the spending for the elderly scored 1,410,269,952,000 euro, divided as follows.

Table 6 - Social expenditure of Municipalities for the elderly. Year 2008 (absolute values and %)

		a.v.	%
Services and interventions	Social work Service	91,909,438	6.5
	Social Integration	42,736,723	3.0
	Home care	539,662,179	38.3
	Support services (transportation and soup kitchen)	26,088,403	1.8
Payments ⁶⁷	Payments of interventions and various services	392,200,108	27.8
Structures	Diurnal or semi-residential facilities	82,932,733	5.9
	Community and residential Nursing homes and Rest homes	234,740,368	16.6
Total		1,410,269,952	100.0

Source: ISFOL elaborations on ISTAT data 2011

Almost half of the expenditure has been allocated to the implementation of services, and particularly the development of home care, which has 38.3% of spending, followed by payments with 27.8% and the development of community and residential facilities (16.6%); 17% of payments has been committed to residential services, which have pledged some 233 million euro. Social policies directed to families for the care of older members seem to have moved towards the development of home care services, while financial costs associated with residential services still remains an element of strong investment of public spending.

Further details on access of the elderly population to social policy measures is available looking at the monitoring of the services provided on the basis of the Equivalent Economical Situation Indicator (ISEE)⁶⁸

⁶⁶ Istat, *Gli interventi e i servizi sociali dei comuni singoli e associati*, Istat, Statistiche Report, 19 April 2011.

⁶⁷ It refers to the items: vouchers and meal vouchers (0.15%), fees for personal services (1.44%), financial contributions for health or medical services (0.42%), fees for day care centers (0.43%), fees for other benefits (0.38%), fees for residential services (16.53%), contributions to the transport service (0.10%), loans (0.22%), financial contributions for housing (1.01%), financial contributions to integrate family income (3.42%), contributions to foster care (0.37%), general contributions to social organizations (1.38), transfers to municipal companies for tariff concessions for transport (0.65%), other (1.32%).

⁶⁸ Ministry of Labour and Social Policies, Report ISEE 2011, Notebooks of Social Research 13. Introduced by D.Lgs.109/98, the ISEE indicator is a meter used by the Italian law to size the cost sharing of social services on the basis of the economic capacity of the beneficiaries, to ensure access to services to the less affluent people (exclusive access,

used to size the beneficiaries cost sharing to local and national social services on the basis of a means test. Among these, the following services, directly targeted to the elderly, are provided on a means test basis (some of them are already mentioned in Commitment 3).

Table 7 -Social benefits of national, regional and local nature paid on the basis of the ISEE.

National benefits	Social Card for people over 60 or under 3; it can be used to support the spending on food, health care and the payment of electricity bills and gas. Electricity bonus Facility fee for telephone
Main Regional and Local services	Health and social services (home care) Health and social services (day care, residential services, etc.) Other economic performance benefits (e.g. minimum income, extraordinary assistance etc.)
Services using the ISEE on a discretionary basis	Exemption from prescription charges (e.g. Sicily) Contribution for the payment of house rent (Law 431/1998) reduction for rent in public housing reduction for local transportation Reductions on local taxes (garbage disposal)

Source: Ministry of Labour and Social Policies

The analysis of the socio demographic characteristics of the population, which applies for services listed above, shows that between 2009 and 2010 there was a significant increase in the presence of elders households benefiting from such welfare measures. These families are especially located in Northern and Central Italy, and are composed by elderly people living alone or in pairs.

In 2010, ISEE household composed only by elderly people constitute 27.3% of the ISEE population, with a positive rate of change over the next year of 13.7%. In parallel, between 2009 and 2010, it was found a large increase in demand for social services, with particular reference to day care or residential solutions, with a rate of change between the two years of 24%.

In general, older people are over-represented in the ISEE population. Individuals aged between 65 and 74 years are 19% of people seeking services in the face of their weight on the total Italian population (10.4). Similarly over 75 years old people are 21% of applicants, while representing 9.4% of total inhabitants⁶⁹.

Interventions for non autonomous persons

With regard to the care of non autonomous elderly people and families, a key instrument for services delivery has been represented by the National Fund for Non autonomous Persons (FNPS)⁷⁰.

The National Fund, established by the Law December 27, 2006, No 296 (Budget Law for 2007), represents the attempt to ensure essential levels of health and social services for non autonomous persons and

or reduced cost or without cost). It applies to a defined set of measures not intended for general public, but related, as concerns the range of beneficiaries or the cost, to certain economic situations.

⁶⁹ The comparison refers to the population forecasts prepared dall'ISTAST, *ISTAT Previsioni demografiche. 1° gennaio 2007 – 1° gennaio 2051 (Demographic Forecast. 1 January 2007 – 1 January 2051)*, Information sheet, 19 June 2008.

⁷⁰ The Fund has a national character and was distributed among the Regions on the basis of the potential demand for long-term care services, based on the estimated incidence in the population of persons aged 75 years or more. As regards to the criteria for allocation of resources, 60% of the Fund is distributed among Regions according to the distribution of population over 75 and the remaining 40% according to the proportion with which it is distributed according to a set of indicators related to different social policies, not only to long-term care.

reassemble interventions in an area that experienced over time fragmentation among decision makers (municipalities, Local Health Authorities, Regions and INPS)⁷¹.

The resources of the Fund are intended to cover the cost of social services delivered to people who have been certified as non autonomous, regardless of age. It adds to specific funds that many Regions already established for the care and support of these persons.

The allocation of financial resources to the Regions and Autonomous Provinces was made for the years 2007, 2008, 2009, according to specific areas of intervention and in relation to the following three objectives:

1. to reinforce the single points of access to support, at local level, the access to benefits and services dedicated to non autonomous persons, with particular attention to the diffusion of the information;
2. to strengthen case management of non autonomous persons through an individual plan of assistance that cover both health and social services; also seeking to promote the use of new technologies with the aim of extending the maintenance of conditions of autonomy;
3. to strengthen integrated social and health assistance to enable the person to remain autonomous at home, thereby ensuring he/she can continue living in the family and in the original residential context.

In 2010 the Ministerial Decree October 4, 2010⁷² established that 380 millions euro addressed to Regions should realize interventions and services on the basis of the identification of key priorities, such as the activation or strengthening of a local network for home based case management or the enhancement of service hours addressed at the assistance to non autonomous persons and their families.

A portion of the Fund (0.5%), has finally been devoted by the Ministry of Labour and Social Policies to implement the monitoring of the services provided at regional level, and, in 2010 to the promotion of interventions in areas characterized by fragmented coverage.

In particular, since 2009 the Ministry of Labour has launched an experimental project for the creation of a National Information System on non autonomous persons (SINA). The experimental project SINA was realized in collaboration with the Region of Liguria. It was aimed at the creation and implementation of an information system on social services for non autonomous persons, and is a part of a broader process of building an Information System on Social Services. Project activities were aimed at creating a national information data set in which the different regional systems could coexist, while sharing a minimum standard set of variables. This will allow common indicators to be defined and consistent data to be collected throughout Italy, in order to realize the comparison among the interventions put in place in each local situation. The objective is therefore the construction of a system that, while defining unambiguously non autonomous persons and measuring the phenomenon in a uniform way throughout the Country, could give information the on socio-demographic characteristics of non autonomous persons and on the services already available.

In the initial phase, which started in 2009, the project has involved 12 Regions. Then, thanks to the success of the experimentation and the interest it raised, in 2010 it was extended to other Regions and Autonomous Provinces that had not yet joined the initiative, thus achieving full coverage over the entire territory.

In 2010 it was also issued a public notice containing guidelines for the presentation of experimental⁷³ projects funded by the same resources.

These initiatives are promoted with the objective to speed up ongoing processes of de-institutionalization of non autonomous persons, to strengthen measures in support of neuro-vegetative situations, to

⁷¹ The intervention is part of a wider project to reach the definition of essential social service levels to non autonomous people, in addition to basic levels of Health care which have standard definitions for the entire national territory.

⁷² Providing criteria for the use of the Fund, on the basis of the agreement expressed in the Conference of Regions of July 8, 2010 (see Legislative Decree August 28, 1997, n. 281).

⁷³ Directorial Decree No 94, November 30, 2010, for a total amount of funding equal to 20.04 million euros

strengthen support to families of people living in a neuro-vegetative state following a network approach that favor initiatives of self and mutual-help, assuming the partnership with ONGs as a model of governance. From 2007 now on some Regional Administration, mostly of which are in Northern and Central Italy (Emilia Romagna, Liguria, Veneto, Friuli Venezia Giulia, Lombardy, Lazio, Tuscany, Basilicata, Sardinia, Umbria, Autonomous Provinces of Trento and Bolzano) launched policies dedicated non autonomous persons, enforcing specific norms establishing special funds or establishing these funds with budgetary laws. According to regional choices, the creation of such funds was aimed at:

- enhancing home care integrated services and developing networks aimed at fostering case management and community based care;
- benefits transfers (i.e. care vouchers, social vouchers, socio-medical vouchers), favoring self-organization of families in addition to public welfare provisions (i.e. attendance allowance – *indennità di accompagnamento*).

Although today it was not still provided for the allocation of resources for the year 2011, the Law 10 of 26 February, 2011, conversion with amendments of Decree Law No. 225, 29 December 2010, Article 2 states that "[...] coming from the total resources spent on liquidation of the share of five per thousand in the year 2011 are quantified within 400 million euro"; an amount of 100 million euro is allocated to interventions for amyotrophic lateral sclerosis (ALS) research and for home care, according to Article 1, paragraph 1264, of 27 December 2006, no 296⁷⁴.

Solidarity between Generations

The theme of the cultural construction of a pact of solidarity between generations, it was finally tackled by the Italian Government as part of the Third Biennial National Plan of actions and interventions to protect the rights of children, approved by the Decree of President of the Republic of 21 January 2010.

With the adoption of the Plan, the Italian government takes a Programming commitment to facilitate the consolidation of a space for expression and exchange between generations on: knowledge sharing and enhancement of creativity for all ages, strengthening of mutual-help, promotion of a shared responsibility for education, enhancement of capacity to manage conflicts between generations. The Plan provides for the constitution of a national board composed by National and Local Administrations, private social organizations, experts and other stakeholders with the aim of monitoring and developing social innovations; consulting bodies, composed by local voluntary and cultural associations; training for social workers; educational workshops and projects of various kinds (exhibitions, local promotion, volunteers activities, suggestions for improvement of the urban context) centred on the exchange between generations, strengthening of meeting points and places, information and support for and among families.

⁷⁴ The abovementioned law, expressly provides that the portion to be allocated to the SLA, as well as apply for the liquidation amount of five per thousand, face the same reference to the Fund for non self-sufficient in Article 1, paragraph 27 of Law 1264 December 2006, no 296 (Finance Act 2007) to ensure the implementation of the basic level of welfare benefits to be ensured throughout the national territory. Even with reference to the aforementioned introduction, for the year 2010, a 5% share in the direct management falls within the jurisdiction of the Ministry of Labour and Social Policy, the payment of these funds is, once again, in favor of regions (and, in this specific case, the autonomous provinces).

3.10 Commitment 10: To promote the implementation and follow-up of the regional implementation strategy through regional cooperation

Italy has taken part since its foundation in 2008 to the activities of the UNECE Working Group on Ageing. In the same area Italy has supported by means of national focal points, the contents of the site <http://www.monitoringris.org> and has periodically updated the monitoring indicators of the Maimi Project.



Ministero del Lavoro e delle Politiche Sociali

**REPORT ON THE FOLLOW-UP TO THE REGIONAL IMPLEMENTATION STRATEGY (RIS) OF
THE MADRID INTERNATIONAL PLAN OF ACTION ON AGEING (MIPAA) IN ITALY**

ANNEXES

January 2012

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Demographic indicators

Year	2007	2008	2009	2010	2011^T
<i>Birth rate (per thousand)</i>	9.5	9.6	9.5	9.2	..
<i>Mortality rate (per thousand)</i>	9.6	9.8	9.8	9.7	..
<i>Natural increase (per thousand)</i>	-0.1	-0.1	-0.3	-0.5	..
<i>Total growth (per thousand)</i>	8.3	7.1	5	4.3	..
<i>Average number of children per woman (TFT)</i>	1.37	1.42	1.41	1.4	..
<i>Life expectancy at birth - male</i>	78.7	78.6	78.9	79.1	..
<i>Life expectancy at age 65 - male</i>	17.9	18	18.1	18.3	..
<i>Life expectancy at birth - female</i>	84	84	84.1	84.3	..
<i>Life expectancy at age 65 -female</i>	21.6	21.6	21.7	21.9	..
<i>Percentage of population 0-14 years (at 1 January)</i>	14.1	14	14	14.1	14
<i>Percentage of population 15-64 years (at 1 January)</i>	66	65.9	65.8	65.7	65.7
<i>Percentage of population 65+ (at 1 January)</i>	19.9	20	20.1	20.2	20.3
<i>Dependency ratio (at 1 January)</i>	52	52	52	52	52
<i>Elderly dependency ratio (at 1 January)</i>	30	30	31	31	31
<i>Aging index (at 1 January)</i>	142	143	143	144	144
<i>Median age (1 January)</i>	43	43	43	43	43

Source: ISTAT demographic indicators

¹ Provisional data

Poverty**Incidence of poverty by household type, elders in the family and age of breadwinner person - years 2009 and 2010 (%)**

	Relative poverty		Absolute poverty	
	2009	2010	2009	2010
Household type				
Single under 65	2.8	2.9	2.7	2.8
Single 65+	10.2	8.9	6.4	5.7
Household under 65	5.8	5	3	1.9
Household 65 +	12.1	11.5	3.8	3.8
Households including elders				
1 elder	11.1	11.2	5.5	5.7
2 or more elders	15.1	14.8	5	5.2
Age class				
under 34	9.9	10.2	4.8	4.3
34-44	12.5	11.7	5.6	4.4
45-54	9.6	10.6	3.9	4.9
55-64	7.9	8.7	3.4	3.3
65 +	12.4	12.2	5.5	5.4

Source: ISTAT 2010 - La Povertà in Italia (Poverty in Italy)

Pensions***Distribution of pensions by typology and age class - Year 2009 (%)***

Age class	Old-age	Disability	Survivours	Allowances	Social pensions	Civil invalidity	War pensions
0-14	-	-	1.1	0.1	-	5.2	0.0
15-39	-	1.2	2.4	5.7	-	9.9	1.3
40-64	24.6	24.0	14.5	33.9	-	26.1	9.1
65-79	57.2	28.5	40.8	41.2	80.5	19.2	26.8
80 +	18.2	46.3	41.3	19.0	19.5	39.5	62.8
Total	100	100	100	100	100	100	100

Source: ISTAT – INPS. Trattamenti pensionistici e beneficiari al 31 dicembre 2009 (Pensions and beneficiaries at 31 December 2009)

Labour market indicators**Employment rate by age – Years 2009 and 2010**

	15-64		45-54		55-64	
	2009	2010	2009	2010	2009	2010
Men	68.6	67.7	87.4	86.4	46.7	47.6
Women	46.4	46.1	57.3	58.0	25.4	26.2
Total	57.5	56.9	72.2	72.0	35.7	36.6

Source: ISTAT

Unemployment rate by age – Years 2009 and 2010

	15-64		45-54		55-64	
	2009	2010	2009	2010	2009	2010
Men	6.9	7.7	4.2	4.7	3.7	3.9
Women	9.3	9.7	5.0	5.3	2.8	3.0
Total	7.9	8.5	4.5	5.0	3.4	3.6

Source: ISTAT

Activity rate by age – Years 2009 and 2010

	15-64		45-54		55-64	
	2009	2010	2009	2010	2009	2010
Men	73.7	73.3	91.2	90.6	48.5	49.6
Women	51.1	51.1	60.3	61.2	26.1	27.0
Total	62.4	62.2	75.6	75.8	37.0	38.0

Source: ISTAT

Life-long learning

Participation to training activities of people 18-64, by age class. Year 2011 – (%)

	Formal	Non Formal	Informal
18-24	64.4	31.3	87.3
25-34	18.7	34.3	82.8
35-44	2.7	28.3	76.4
45-54	1.1	25.5	71.4
55-64	0.2	16.2	63.1
Total	12.1	26.9	75.2

Source: Isfol INDACO - Indagine sui comportamenti formativi degli adulti – 2011 (Survey on the adults' learning behaviors)

Health and assistance

Perceived health conditions of the population (every 100 persons) – Years 2009 and 2010 (%)

Health condition	total		55-59		60-64		65-74		75+	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
good health	69.3	70.6	57.5	58.8	49.4	53.6	36.9	38.8	20.9	22.2
(good health) very good	18.7	20.1	6	7.1	4.3	5.7	2.6	3.1	1.3	2
good	50.6	50.6	51.5	51.7	45.1	47.9	34.3	35.7	19.5	20.1
fair	24.5	23.5	36.6	35.3	42.6	38.5	48.8	48.2	50.4	51.3
bad	5.2	4.9	5.2	5.5	7	6.7	12	11.2	24	21.9
very bad	1	0.9	0.7	0.5	1	1.2	2.3	1.8	4.8	4.6

Source: ISTAT

Home care - Year 2009

Regions	Elderly beneficiaries		Elderly beneficiaries every 1.000 inhabitants	Hours of assistance provided by case			
	Cases	% percentage on the total		Total	Rehabilitation therapists	Registered nurses	Other personnel
Piemonte	23.222	77.2	23.1	17.0	0.6	9.7	6.7
Valle D'Aosta	101	60.8	3.8	66.0	3.4	18.5	44.0
Lombardia	79.843	85.2	41.1	17.0	3.8	11.4	1.7
Prov. Auton. Trento	360	55.4	4.1	-	-	-	-
Prov. Auton. Bolzano	1.100	57.4	11.0	25.0	-	25.0	-
Veneto	46.602	82.0	48.5	10.5	0.9	9.0	0.7
Friuli Venezia Giulia	22.090	88.1	77.4	6.4	1.1	5.1	0.2
Liguria	14.925	91.7	34.5	19.7	5.3	12.0	2.4
Emilia Romagna	81.490	90.6	83.6	17.0	0.1	14.1	2.8
Toscana	19.178	78.3	22.2	20.8	1.5	16.4	2.9
Umbria	15.723	87.0	76.0	14.9	0.8	8.4	5.7
Marche	12.782	85.0	36.3	28.1	4.6	20.9	2.6
Lazio	44.249	86.2	40.0	18.1	5.7	11.5	0.9
Abruzzo	13.555	80.2	47.8	25.5	10.8	14.5	0.2
Molise	1.714	81.3	24.4	55.5	13.0	40.0	2.5
Campania	17.200	76.7	18.6	36.5	7.0	23.2	6.2
Puglia	15.064	83.7	20.5	42.7	12.7	23.9	6.1
Basilicata	6.015	81.5	50.7	38.7	15.1	21.9	1.7
Calabria	9.529	81.4	25.5	25.5	4.6	20.3	0.6
Sicilia	9.986	67.9	10.8	25.5	8.9	15.9	0.8
Sardegna	7.401	76.2	23.7	22.8	5.0	16.8	1.0
Italia	442.129	84.0	36.6	19.2	3.5	13.3	2.4

Source: Ministero della Salute - Sistema Informativo Sanitario (Ministry of Health - Health Information System)

Hospitalization rate (patients discharged by 1.000 inhabitants) by age class- Year 2009

Regions	65 - 74	75+	All ages
Piemonte	181.2	264.5	113.4
Valle D'Aosta	185.7	319.6	115.5
Lombardia	224.0	323.5	134.2
Prov. Auton. Bolzano	263.1	466.0	143.6
Prov. Auton. Trento	181.4	325.3	103.4
Veneto	190.3	326.2	109.9
Friuli Venezia Giulia	191.8	339.3	119.6
Abruzzo	162.9	291.2	122.7
Basilicata	209.4	337.4	137.0
Calabria	186.7	312.6	122.8
Campania	205.2	325.2	135.0
Emilia Romagna	193.5	324.1	125.2
Lazio	219.5	329.2	133.7
Liguria	211.1	316.8	126.8
Marche	293.5	376.9	159.4
Molise	247.2	325.0	128.5
Puglia	256.6	373.2	143.9
Sardegna	188.7	310.6	105.6
Sicilia	186.1	276.5	106.5
Toscana	217.9	302.7	120.1
Umbria	197.2	340.1	118.3
Italy	210.7	320.3	126.3

Source: - Ministero della Salute - Sistema Informativo Sanitario - Scheda di dimissione ospedaliera (Ministry of Health - Health Information System – Hospital discharges)

