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Poverty dynamics in Italy: an analysis of territorial disparities

Chiara Mussida *
Dario Sciulli **

Abstract

In this paper, we explore the role of both observable and unobservable factors, as well as state dependence, in determining the risk of poverty and its persistence in Italy. We consider three measures: the at risk of poverty, subjective poverty, and severe material deprivation, motivated by the understanding of poverty as a complex, multifaceted and persistent phenomenon. The empirical analysis is based on the 2015–2018 longitudinal sample of the EU-SILC survey. We focus on Italian macro-regions and apply correlated random effects probit models with endogenous initial conditions. Regardless of the poverty measure employed, we find evidence of strong state dependence and an increasing scarring effect in the South of Italy. We also find a protective role against poverty for education and

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(stable) employment for all macro-regions and poverty measures. Nonetheless, the other observable characteristics play roles that are often different across measures and areas.

Sintesi - Analisi dinamica della povertà in Italia: uno studio delle disparità territoriali

Nel presente lavoro analizziamo il ruolo dei fattori osservabili e non osservabili e della dipendenza di stato nel determinare il rischio di povertà e la sua persistenza in Italia. Consideriamo tre indicatori: rischio di povertà, povertà soggettiva e deprivazione materiale severa al fine di comprendere la povertà quale fenomeno complesso, sfaccettato e persistente.

L'analisi empirica si basa sulla versione longitudinale dei dati EU-SILC per il periodo 2015-2018. Ci focalizziamo sulle macro regioni italiane e stimiamo modelli probit dinamici ad effetti casuali correlati e con condizioni iniziali endogene. A prescindere dall'indicatore di povertà considerato, troviamo evidenza di forte dipendenza di stato che contribuisce a determinare povertà permanente soprattutto nel Sud Italia. Troviamo anche che istruzione ed occupazione stabile sono fattori protettivi contro il rischio di povertà secondo tutte le misure esaminate ed in tutte le macroregioni. Tuttavia, le altre caratteristiche osservate esercitano ruoli che spesso divergono tra misure e macroregioni.

JEL Classification: C23; I32; I20; I38; J21.

Parole chiave: *Rischio di povertà; Modelli probit dinamici a effetti fissi correlati; Persistenza; Condizioni iniziali; Italia; Divario geografico*

Keywords: Risk of poverty; Correlated random effects probit models; Persistence; Initial conditions; Italy; Geographical divide

1. Introduction

The period between the Great Recession and the Covid-19 pandemic era was characterized by high and persistent poverty rates in many European countries. The rise of unemployment and the financial troubles caused by the Great Recession, as well as the adoption of contractionary fiscal policies during the sovereign debt crisis and the deregulation of the labour market, have contributed to exacerbating the socioeconomic vulnerability of societies (e.g. Jenkins, 2020).

This condition required the intervention of European institutions and national governments, both for ethical motivations and the concern about consequences in terms of social exclusion, social conflict, lower educational investment, human capital depreciation, and economic growth in the long run.

In this context, in 2010 the European Commission launched the Europe 2020 Strategy for smart, sustainable, and inclusive growth, which included measures to fight poverty and social exclusion and set the target of lifting over 20 million people out of poverty and social exclusion by 2020. The objective failed significantly, however, with the number of poor individuals in Europe decreasing by only about 10 million people from 2010 to 2019, and it has even increased in some countries. The commitment against poverty has been recently reconfirmed by the 2030 Agenda for Sustainable Development of the United Nations (2015), however, which includes among its 17 Sustainable Development Goals (SDGs) some objectives aimed at eradicating poverty and achieving worldwide sustainable development by 2030.

Understanding the causes of this disappointing performance is important to gain a deeper knowledge of the mechanisms guiding poverty and to formulate guidelines to design effective anti-poverty measures. A key issue when analysing poverty is the distinction between persistent and transitory poverty, as factors that trap individuals into long-term poverty may be substantially different from

the factors that determine short-term poverty. Poverty persistence may be caused by observable (e.g. low education, unemployment and underemployment, and bad health) and unobservable factors (e.g. low motivation and a lack of cognitive and non-cognitive abilities), as well as state dependence, which indicates how current poverty *per se* causes future poverty (Biewen, 2014). Identifying the role of such factors in determining the risk of poverty and its persistence is crucial to designing effective policies against poverty. On the one hand, the degree of state dependence is important for defining whether and how preventing poverty or moving individuals above the poverty line once they have fallen in could be effective to combat poverty in the long run. On the other hand, uncovering the role of observable factors would allow identifying potential policy targets, with the aim of removing structural causes of poverty.

This paper focuses on the determinants of poverty in Italy, a country that experienced a rise in the number of people at risk of poverty or social exclusion in the second decade of the 2000s (from 24.9% in 2010 to 25.6% in 2019, with peaks of 30% in 2012 and 2016) and that is characterized by income inequality (e.g. Franzini, 2010) and longstanding territorial dualism. Southern regions experience underdevelopment, a weaker labour market, and higher poverty rates; recent statistics (Eurostat, 2021) revealed that people at risk of poverty or social exclusion have exceeded 40% in southern regions, while they were about 15% in the northern ones in the pre-pandemic period. The issue of territorial dualism in terms of poverty in Italy has been previously accounted for by Devicienti et al. (2014), Coppola and Di Laurea (2016), and Giarda and Moroni (2018), but no specific evidence exists about territorial disparities in poverty persistence. Providing evidence on the determinants of poverty at the macro-regional level is important for its characterization and for a better understanding of the origins of territorial inequality in Italy.

We measure poverty by using the well-known at-risk-of-poverty (AROP) in-

indicator, possibly the most commonly used when analysing this phenomenon. Supporting the analysis by using alternative indicators, however, may be important for at least two reasons. First, because the nature of poverty is multifaceted the use of alternative indicators may be useful to highlight its composite nature (e.g. Devicienti et al., 2014, Fabrizi and Mussida, 2020). Second, because Italian macro-regions are characterized by important differences in price levels and thus the purchasing power of households exhibits significant differences across territories, the use of indicators robust to price level heterogeneity may help to circumvent possible over(under)-representation of poverty in the poorer (richer) areas of Italy. With this in mind, we add evidence on poverty in Italy using two supplementary indicators, namely subjective poverty (SP) and severe material deprivation (SMD).¹ In addition, we recalculate the AROP indicator by defining the poverty lines at the macro-regional level rather than at the national level, with the aim of accounting for structural differences in purchasing-power levels across macro-regions.

The empirical strategy is based on the use of the 2015–2018 European Union Statistics on Income and Living Conditions (EU-SILC) and a dynamic probit model with correlated random effects and endogenous initial conditions. The advantages of using the EU-SILC dataset include its longitudinal structure, which allows accounting for the dynamics of poverty, and the richness of the information available, which lends itself to the construction of alternative poverty indicators. The econometric approach adopted allows disentangling the components of poverty into genuine state dependence and observable and unobservable factors. In addition, by estimating both genuine state dependence and the initial conditions, we are able to characterize the evolution of the scarring effect of poverty over time. Finally, by carrying out the analysis at the macro-regional

¹ Both indicators are defined according to the European Union's standards as they are implemented in the EU-SILC survey (Marlier et al., 2012).

level, we can highlight the existence of territorial disparities in the determinants of poverty persistence and, particularly, differences in genuine state dependence.

The dynamic probit model is estimated following Wooldridge (2005), who suggested the use of an alternative conditional maximum likelihood (CML) estimator, a method that relaxes the independence assumption between time-invariant unobserved heterogeneity and other covariates in the vein of Mundlak (1978). However, because the Wooldridge method may be problematic with short panels (Akay, 2012), we use the Rabe-Hesketh and Skrondal (2013) extension of the Wooldridge model.

Our results confirm the existence of territorial disparities, with southern regions showing higher poverty rates and higher poverty persistence than other territories. This is the consequence of greater genuine state dependence and a scarring effect of poverty in Southern Italy. In addition, investment in education and employment stability would be particularly effective in reducing disadvantages in the South. The use of alternative indicators essentially confirms these findings, with some exception when using the AROP indicator based on macro-regional poverty lines.

2. Literature

While many studies focus on the determinants of poverty, and social exclusion more generally, by using either static or dynamic frameworks and including the area of residence as a control variable, there is a lack of studies focusing on the importance of within country regional disparities, which are crucial for Italy.

A strand of literature explores the effect of recessions on poverty and pinpoints the disadvantage for Southern Italy (Addabbo, 2000, Baldini and Ciani,

2011, for Italy; Addabbo et al., 2013 for Italy and Spain). The work by Addabbo (2000) explores the changes that took place in terms of poverty after the 1993 recession. The analysis suggests a greater diffusion, intensity, and persistence of poverty in the South of Italy after the crisis compared to other macro-regions, and among households headed by young and low-educated persons. Baldini and Ciani (2011) offer quantitative simulations of the changes in inequality and poverty for Italian households during the Great Recession. The findings suggest that the reduction in employment rates originated by the crisis hit younger workers much more than the rest of the population, as well as those with low education levels and foreigners. According to their simulations, the Great Recession should have increased inequality and poverty. Addabbo et al. (2013) investigate the effects of the Great Recession on poverty and deprivation in Italy and Spain. Their findings suggest an increase of the risk of poverty for female single-parent households, as well as part-timers and temporary workers. Living in the South of Italy or in the Spanish regions of Andalusia and Extremadura, increases income poverty, especially after the recession.

Another strand explores the determinants of poverty and other poverty measures of social exclusion, sometimes offering comparisons (Devicienti et al., 2014; Parodi and Sciulli, 2019; Fabrizi and Mussida, 2020).

Devicienti et al. (2014) study in parallel the dynamics and persistence of two different definitions of poverty: income poverty and a multidimensional index of lifestyle deprivation. Their findings suggest that people living in households with many children, with a head of household who is either very young or very old, and with low education, constitute cases with a high risk of persistent poverty. Irrespective of the definition of poverty, the household's area of residence was found to be of crucial importance.

Parodi and Sciulli (2019) investigates how the presence of disabled member(s) affects a household's risk of being socially excluded. When uncovering

the determinants of social exclusion, they find that genuine state dependence is greater for households with persons with disabilities. In the medium/long-term this may involve the persistence of social exclusion, which is associated with several negative socio-economic outcomes. Moreover, in Italy social exclusion is associated with several structural factors, such as low education, the presence of children, and living in southern regions.

Fabrizi and Mussida (2020) examine the phenomena of at-risk-of-poverty, subjective poverty and severe material deprivation for households with dependent children. They assess the role of genuine state dependence, structural household characteristics, and variables related to labour market participation. Their findings indicate strong genuine state dependence for all the poverty measures. Variables influencing current income, such as labour market participation, are key to the dynamics of the at-risk-of poverty, while structural variables, such as the education level of household adults, play an important role in the dynamics of subjective poverty and severe material deprivation.

At least to our knowledge, the works of Devicienti and Poggi (2011), Coppola and Di Laurea (2016), and Giarda and Moroni (2018) are among the few pinpointing the role of geographical differentials in explaining poverty in Italy.

The work by Devicienti and Poggi (2011) explores the determinants of at-risk-of poverty. Their findings suggest that being young and lowly educated increases the risk. The number of economically active members in a household decreases the probability of being in poverty, whereas this increases with the number of children and other dependent adults in the household. Southern regions consistently display higher risks of income poverty than both Northern and Central regions.

Coppola and Di Laurea (2016) examine persistent at-risk-of-poverty at the beginning of the Great Recession and explore the relevance of territorial dualism in Italy. Their findings suggest that male employees are more likely to prevent

persistent poverty for their households, while the opposite holds for female family breadwinners. The Southern disadvantage slightly decreased at the beginning of the crisis, due to the worsening economic conditions in the North and Centre.

Giarda and Moroni (2018) explore poverty dynamics in Italy and compares it to France, Spain and the UK, by investigating transitions into/out of poverty, and providing an econometric quantification of poverty state dependence by pinpointing the role of regional disparities. Both analyses suggest that Italy is the country with the most persistent poverty and the relatively high relevance of regional disparities.

Overall, the evidence suggests a disadvantage of southern Italian regions, but we do not find specific and detailed geographical investigations. Inspired by this literature, we explore the determinants of poverty dynamics in Italy with a specific emphasis on the role of within-country regional disparities.

3. Data and Indicators

We analyse data from the four successive waves of the EU-SILC survey that took place between 2015 and 2018, focusing on the Italian sample. The survey is conducted in most countries across the European Union by the relevant national institutes of statistics, using harmonized definitions and survey methodologies. The topics covered by the survey encompass living conditions, income, social exclusion, housing, work, demographics, and education. We focus on the phenomenon of poverty, and our units of analysis are the individuals.

The AROP, which is our variable of interest, is defined as the fraction of people living with an equivalized income below a threshold defined to be 60% of the national median. Equivalized income is the total disposable household income

divided by an equivalized household size calculated according to the modified OECD scale.² This measure of poverty has a long tradition and strong policy relevance, and it is associated with the concept of current income. However, the indicator has been criticized in many respects. One of the main criticisms refers to the threshold used for the calculation being based on the national median income. The fact that the threshold is national makes the AROP not properly suited to cross-country comparisons, but also to comparing regions within the same country if the country is characterized by important economic divides, as is the case of Italy (Mogstad et al., 2007).

To overcome these drawbacks, and because poverty is a complex, multifaceted phenomenon for which no single measure can be completely satisfactory, we decided to reproduce the same analyses for two additional and very popular poverty measures, namely subjective poverty and severe material deprivation. We employ these indicators and related concepts as they are defined within the EU-SILC survey (Fusco et al., 2010).

Subjective poverty is based on a single question in the EU-SILC survey about the ability of the household to make ends meet. An individual is classified as poor if she/he lives in a household that provides the answer *with great difficulty*; otherwise, they are not considered as such. The other answers to this question are *with difficulty*, *with some difficulty*, *fairly easily*, *easily*, and *very easily*. In general, this evaluation of economic status will be influenced by both the current and the permanent income (Whelan and Maitre, 2010) but also social capital (Guagnano et al., 2016) and the social environment in which the household lives (Buttler, 2013).

Severe material deprivation was chosen as it is multidimensional, is more ori-

2 This is a standard equivalence scale to calculate the number of 'equivalent adults' in a household. Such a scale assigns a weight of 1.0 to the first adult, 0.5 to the second and each subsequent person aged 14 and over, and 0.3 to each child under 14.

ented to the actual standard of living, and makes reference to a set of resources and functioning that are more naturally related to the concept of permanent income (Ayala et al., 2011). It is defined using a battery of nine household-level questions with yes/no answers, each focused on measuring the ability/inability to afford items considered by most people to be desirable or even necessary to reach an adequate standard of living.³ People are experiencing SMD if they live in households lacking at least four of these items. As with the other measures of poverty, SMD has been criticized for the choice of the items, their validity, and their reliability.

We conduct our analysis separately by poverty measure for Italy and by geographical area for the 2015–2018 period. Table 1 reports the summary statistics. In the top panel, we report the measures of poverty used as well as their lags and initial conditions. As expected, we note that the indicators differ widely across Italian areas (see Figure 1). Notably, in the South we find percentages almost three times higher than in the North-East for all measures (for AROP, 34.2% in the South and 11.6% in the North-East; for SP, 42.6% in the South and 18.5% in the North-East; for SMD, 19.9% in the South and 6% in the North-East), as well as for their lagged values and initial conditions. The South of Italy, therefore, is disadvantaged with respect to the other regions, regardless of the poverty measure adopted.

We further explore our sample by showing its composition in terms of ‘never poor’, ‘temporary poor’, and ‘always poor’ in Figure 2. We note that most of the sample is never in a condition of poverty (during the period examined), with relatively higher values for SMD. As expected, subjective poverty is more frequent as a ‘temporary poor’ category (subjective evaluation), while SMD (low %) in

3 The items are: 1) coping with unexpected expenses; 2) one week’s annual holiday away from home; 3) avoiding arrears (in mortgage or rent, utility bills, or hire-purchase instalments); 4) a meal with meat, chicken, fish or a vegetarian equivalent every second day; 5) keeping the home adequately warm; 6) a washing machine; 7) a colour TV; 8) a telephone; 9) a personal car.

the ‘never poor’.

Inspired by the literature discussed in Section 2, we control for individual and household characteristics. The former refers to the head of household, and we consider the age range (from ‘younger than 25’ to ‘over 64’), gender, educational attainment level, and marital status (whether they are married or not). For household composition, we add a control for single households, dummies for the specific age range of children (0–3 and 4–15, respectively), being a homeowner, and labour market attainment, such as the number of permanent employees, temporary workers, and self-employed in the household. Finally, as we are using a panel dataset, we add yearly dummy variables to our specifications.

4. Econometric analysis

The analysis of poverty by Italian macro regions has been conducted using the at risk of poverty (AROP) indicator. In addition, as explained above, with the aim of uncovering different facets of poverty and considering indicators robust to different price levels, we also model severe material deprivation (SMD) and subjective poverty (SP).

Because the main focus is on poverty persistence, our empirical strategy is based on dynamic probit models with correlated random effects and endogenous initial conditions. This allows us to disentangle the contribution of genuine state dependence and observed and unobserved heterogeneity to poverty persistence. The role of observable heterogeneity is controlled for by including a wide range of individual and household variables. In addition, we model time-invariant unobserved heterogeneity by including individual-specific random effects. Finally, we consistently estimate state dependence (genuine state dependence) by includ-

ing the lagged dependent variable on the right side of the poverty equation and accounting for possible endogeneity between initial conditions and unobserved heterogeneity (e.g. Heckman, 1981). The initial conditions problem is tackled by following Wooldridge (2005), who suggested an alternative conditional maximum likelihood (CML) estimator that considers the distribution conditional on the value in the initial period and include Mundlak's approach, thus we are able to estimate a correlated random effects probit model with endogenous initial conditions. However, because Wooldridge's approach may produce biased estimations of genuine state dependence in case of short panels (Akay, 2012), we definitively rely on the technique proposed by Rabe-Hesketh and Skrondal (2013), which extended Wooldridge's approach and recommended to include as additional regressors in the auxiliary model the initial period of time-varying explanatory variables, with the aim of reducing the substantial finite sample bias.

Let us define p_{it} as the individual poverty status of individual $i = 1, \dots, n$ at time $t = 1, \dots, T$. According to method proposed by Rabe-Hesketh and Skrondal (2013), we assume that poverty status is described by the following model:

$$p_{it} = 1\{\gamma p_{i-1} + \beta x_{it} + \varphi z_i + a_i + u_{it} > 0\}, \quad (1)$$

where p_{i-1} is the lagged poverty status and x_{it} and z_i are vectors of strictly exogenous time-variant and time-invariant (respectively) individual and household characteristics.⁴ γ is the (genuine) state dependence parameter, and β and φ are sets of parameters to be estimated. u_{it} is an idiosyncratic error term which we assume to be normally distributed, with zero mean and unit variance and not serially correlated. Finally, the term a_i represents the unobserved time-invariant

4 In particular, the set of time-variant covariates x_{it} includes age variables, marital status, single, presence of children, number of people with disabilities, elderly, and employed/self-employed, while the set of time-invariant covariates z_i includes female and educational variables, which we assume to be invariant in the short/medium term.

individual-specific random effects, which we assume to be normally distributed. However, because of the incidental parameters problem, the term a_i cannot be considered as a standard parameter to be estimated (Heckman, 1981). To deal with this issue, we incorporate in our specification the Mundlak's method (1978) which enables us to relax the assumption that individual-specific random effects are independent of other covariates, and assume correlated random effects by decomposing the unobserved heterogeneity term into two parts, one correlated and one uncorrelated with time-variant covariates. This allows us to rule out the correlations between the unobserved random effect, covariates and initial status.

According to Wooldridge approach (2005) and its extensions, the conditional densities of the individual-specific random effects are specified via the following auxiliary model:

$$a_i = \theta_0 + \theta_1 p_{i1} + \theta_2 \bar{x}_i + \theta_3 x_{i1} + \mu_i \quad (2)$$

where p_{i1} is the initial poverty status and \bar{x}_i is a set of time-averaged time-variant control variables calculated from periods 2 to T , x_{i1} is a set of initial values of time-varying covariates and θ_k are parameters to be estimated. The term μ_i is residual unobserved heterogeneity which we assume to be independent of observed characteristics and is drawn from a normal distribution with zero mean and variance σ^2 .

Finally, with the aim of making easier the interpretation of estimation results we compute and report average marginal effects (AME), since estimated coefficients just allow describing the sign of the relationship but are inappropriate to determine the magnitude of the impact between outcome and explanatory variables.

5. Estimation results

This section presents the results of our study. The first sub-section focuses on the analysis of the determinants of poverty in Italian macro-regions when using the at-risk-of-poverty indicator, while the second sub-section highlights the differences that emerge when poverty is measured using alternative indicators, namely subjective poverty and severe material deprivation.

5.1. The determinants of at-risk-of-poverty by Italian macro-region

Table 2 reports estimates of the determinants of poverty by Italian macro-region when using the AROP indicator. We firstly describe the way past poverty affects current poverty status. By applying a dynamic probit model with correlated random effects and endogenous initial conditions, we are able to identify the role of genuine state dependence and uncover the evolution of the scarring effect of poverty.

Some common findings emerge across Italian macro-regions. First, our analysis indicates the existence of a positive causal impact of past poverty status on current poverty conditions. In other terms, once individuals have fallen into poverty, they risk being trapped in it. Our estimates reveal that being poor in the previous year increases the probability of being currently poor by 5.2 p.p. in the North-West; the poverty trap effect is lower in the North-East (+2.9 p.p.), however, and higher both in the Centre (+8.5 p.p.) and in the South (+8.3 p.p.). These findings suggest that policies aimed at preventing poverty would provide lasting protective effects against poverty, as they would be able to reduce both current and future poverty risk. In addition, they indicate that once individuals fall into poverty, policies aimed at drawing them out of that status would be

effective in the long run. While evidence of genuine state dependence is common to all macro-regions, the magnitude of the impact varies across territories, indicating that the importance of adopting preventative measures would be particularly effective in the central and southern Italian regions.

When looking at the initial poverty status, it emerges that the magnitude of the estimated coefficients is greater than that associated with past poverty, for all Italian macro-regions. Being poor in the first observed year increases the risk of being currently poor by 13.7 p.p. in the North-West. The impact is slightly smaller in the North-East, at +11 p.p., while it is +14.4 p.p. in the Centre and rises up to +22.4 p.p. in southern regions. Combining the latter findings with those related to genuine state dependence, we can conclude that the scarring effect of poverty has increased over time, pointing to more persistent poverty experiences particularly in Southern Italy.

Figure A1 reports the predicted probabilities of being currently poor conditional on past and initial poverty status. Our estimates reveal that the probability of being currently poor is strongly affected by the poverty status experienced in the initial and last periods. For individuals who did not experience poverty in previous periods, it ranges from 1% (North-East) to 5% (South). Conversely, for those who experienced poverty both in the initial and in the last periods the predicted probabilities of being currently poor range from 54% (North-East) to 75% (South). In line with our AME estimates, we find that the role of initial poverty status appears to be more important than state dependence in affecting the probability of being currently poor. All in all, these results confirm the importance of poverty persistence in determining the risk of poverty in Italy and the existence of serious territorial disparities.

Focusing on observable factors, we pay specific attention to the role of the education and employment conditions of household members, those variables being particularly important for identifying structural interventions against poverty.

Our estimates confirm the protective role of education against poverty. With low education as the base category, we find that the higher is the level of education of the head of household, the lower is the probability of being poor. The impact, however, diverges across macro-regions. In the North-West, medium and high levels of education have a quite comparable impact on the probability of being poor, as the former determines a decrease of 2.3 p.p. and the latter of 2.6 p.p. In the North-East, having a medium level of education decreases the probability of being poor by 1.3 p.p., while the impact is of -2.4 p.p. for the highly educated. In the Centre, having a medium level of education decreases the probability of being poor by 4.6 p.p., while the impact is of -9 p.p. in the case of a high level of education. Finally, having a medium educational level in the South decreases the probability of being poor by 5.9 p.p., while the impact is -8.8 p.p. for the highly educated. The heterogeneous effect of education across macro-regions is possibly connected to the employment probabilities associated with different educational levels and to the structure of the economic frameworks that characterize Italian regions. Our results suggest that investment in education would be particularly important in less developed areas of the country.

Looking at employment conditions, we find some consistent patterns in our estimates. First, an increase in the number of employed or self-employed individuals in the household determines a decrease in the probability of being poor. Second, the negative impact is stronger for permanent employment than for temporary employment or self-employment. In this context, the magnitude of related impacts is heterogeneous across macro-regions. The impact associated with the number of permanent employees on the probability of being poor ranges from -1.4 p.p. in the North-East to -8.7 p.p. in the South. Looking at the number of temporary employees, the impact ranges from -1.2 p.p. in the North-East to -5.2 p.p. in the South, while for self-employed household members the impact is close to zero and not significant in the North-East and ranges from -2.6 p.p.

in the South to -4.1 p.p. in the Centre. These results confirm the importance of being at work to prevent poverty, and in particular, of the role of stable employment in reducing the risk of being poor, especially in Central and Southern Italy.

Looking at other control variables, we find that the age variables generally determine no statistically significant disparities, with the unique exception of individuals aged 55–64 and living in central and southern Italian regions.

Having a female head of household increases the probability of being poor by 1.4 p.p. in the North-East, by 1 p.p. in the Centre, and by 1.6 p.p. in the South. This finding confirms the existence of female disadvantages in many Italian regions. An exception is represented by the north-western regions, where having a female head of household decreases the probability of being poor by 1 p.p. This finding is possibly connected to the higher employment opportunities of females in that area.

The role of household structure is controlled for by considering marital status, single households, and the presence of children, the elderly, and disabled persons. We find that being married, when significant, is associated with a decrease in the probability of being poor. A similar finding is found when looking at single households. The presence of children has ambiguous effects. The presence of children aged 0–3 decreases the probability of being poor by 4.1 p.p. in the north-western regions and by 4.7 p.p. in the South. This finding may indicate the effectiveness of child-related policies to support households after childbirth. However, it should be considered that the estimated coefficient may be biased because of uncontrolled feedback effects from past poverty to childbirth (see Mussida and Sciulli, 2021). Thus, we need to be cautious about the interpretation, and we consider it as an association rather than a causal relationship. The presence of children aged 4–15 produces a mixed effect on the probability of being poor. In the North-West of Italy, it determines an increase in the probability of being poor of 3.5 p.p., while the impact is negative in the Centre (-3.7 p.p.).

The presence of disabled household members reduces the probability of being poor by 1.7% in north-western regions. This finding may indicate a positive role of disability benefits in raising a household's income, but it must be interpreted with some caution. The approach we use, in fact, does not account for the extra costs of disability, and the same household income may determine different levels of well-being depending on the presence or absence of disabled people.⁵ The presence of elderly persons has a quite strong negative impact on the probability of being poor. The impact ranges from -1.8 p.p. in the North-East to -5.5 p.p. in the South. This finding possibly highlights both the positive role of pensions in increasing household income and the potential childcare role of elderly persons in Italian households, which may contribute to increasing the labour market participation of working-age female members. Being a homeowner is associated with a decrease in the risk of poverty across Italian macro-regions.

We also offer a supplementary analysis to investigate the intensity of poverty. We estimated a dynamic ordered probit with correlated random effect by considering as a dependent variable poverty intensity.⁶ The results (Table A3 in the Appendix) show the existence of state dependence for both poverty and severe poverty status. Notably, we see that in all macroregions the persistence in severe poverty is higher compared to the persistence in poverty, with the partial exception of the Center. When looking at the initial poverty statuses, the magnitude of the AME is greater than that associated to past poverty for all Italian macro-regions, and relatively higher for severely poor in the South. These results confirm that the scarring effect of poverty, especially severe poverty, has increased overtime. Finally, we note a relatively higher effect of protective factors against the risk of poverty, such as education and (permanent) employment, in

5 Studies focusing on income inequality and the poverty of households with disabled members usually account for extra costs by adopting specific equivalent scales (e.g. Kuklys, 2005).

6 The ordinal variable for poverty intensity takes the value 0 for not poor, 1 for poor above the median of the income distribution of poor, and 2 for severely poor that are poor below the median.

the South of Italy.

5.2. Subjective poverty and severe material deprivation

In this section, we discuss the main findings for the alternative poverty measures explored—subjective poverty and severe material deprivation—by pinpointing the main similarities and differences also with respect to the indicator for poverty (discussed in detail in Section 5.1). The AMEs for SP and SMD are reported in Tables 3 and 4, respectively.

The top panels of Tables 3 and 4 show the results for state dependence and initial condition. From Table 3, we note that in contrast to the phenomenon of poverty, for subjective poverty state dependence is an issue (positive and significant) only for the Centre and—especially—the South of Italy (+3.7 and +8.7 p.p., respectively). In these areas of the country, it is more difficult to escape from such a subjective condition. The heterogeneity in the significance and magnitude of the lagged indicator for subjective poverty across macro-regions highlights the importance of carrying out an investigation separately by area. The results for Italy as a whole (as reported in Table A1 in the Appendix and in the literature by, for instance, Fabrizi and Mussida, 2020) indeed suggest a positive state dependence—that is, once subjectively poor people in Italy tend to become trapped in this condition.

When looking at initial subjective poverty status (Table 3), it emerges that the AMEs in all macro-regions are positive, significant, and relatively high in magnitude compared to the AMEs for state dependence. Being in a condition of subjective poverty in the first year increases the risk of being currently subjectively poor by 20.9 p.p. in the North-West. The impact is slightly smaller in the other macro-regions (+18.1 in the North-East, +18.8 p.p. in the Centre, and +18.5 in the South). These results, combined with those for SP persistence, suggest that

while the scarring effect of poverty increased over time in Central and Southern regions—pointing to more persistent poverty experiences (especially in Southern Italy)—it reduced over time in the North.

As for SMD, from Table 4 we see that the trap effect is positive and significant in all macro-regions, with the exception of the Centre. The magnitude of the AME for past SMD is relatively low, ranging from 3.4 p.p. in the North-East to 5 p.p. in the North-West. A common finding across the poverty measures investigated, therefore, is the presence of state dependence in the South. This confirms that social exclusion is a long-term phenomenon/a trap for individuals residing in the South of Italy and suggests the need for preventative measures, as once entered, all of these poverty conditions become a trap.

When looking at initial SMD, the related AMEs are significant in all areas and greater in magnitude with respect to past SMD in all areas except the North-West. Being in an SMD in the initial year observed increases the risk of currently being in an SMD by 3.9 p.p. in the North. The impact is higher in the Centre (+6.4 p.p.) and especially in the South (+11.8 pp.). Overall, the findings from initial conditions and genuine state dependence suggest that the scarring effect of SMD remained over time in all regions, with the exception of the Centre of Italy.

In general, the scarring effect as measured by initial condition is more an issue for the phenomenon of poverty (in all macro-areas; see Table 2), as it is found to be increasing over time in all regions of the country. A common finding across the measures adopted is (again) the disadvantage of the South, where the scarring effect increases over time.

The role of education emerges for both SP and SMD in all macro-areas. As for poverty, a tertiary educational attainment level (by the head of household) is negatively associated with the risk of being subjectively poor and severely materially deprived, especially in the South (for SP, this ranges from -9.6 p.p. in the North-East to -23.6 p.p. in the South, while for SMD the respective values are

of -3.4 p.p. to -13.6 p.p.). The importance of education against the risks of SP and SMD is supported by the existing evidence on Italy (see, for instance, Fabrizi and Mussida, 2020).

As for the employment conditions within the household, we find a protective role of employment, and especially permanent employment, against the risks of subjective poverty and severe material deprivation. However, the magnitude differs across indicators and macro-regions. For SP, the protective effect is found in all macro-areas (especially in the South, with -14 p.p.), while for SMD it is also found in all macro-areas, with the partial exception of the Centre, but with lower magnitudes compared to those for SP (in the South, for instance, the AME for SMD is -6.4 p.p.).

For temporary employment, we note a reduction in the risk of SP in the North-East and Centre (-3.1 p.p. and -5.2 p.p., respectively), and for SMD in three macro-regions: the North-West (-2.3 p.p.), Centre (-3.5 p.p.), and South (-3.4 p.p.). For self-employment, there is a reduction in SP only in the Centre (-7.2 p.p.), while we note a decrease in the risk of SMD in the North-West (-2.9 p.p.), Centre (-3.4 p.p.), and South (-7.5 p.p.). A common finding across all poverty measures, therefore, is a clear role of stable employment in reducing the risk of social exclusion.

As for the age range of the head of household, we find disparities across indicators and macro-regions. While age does not exert a role on the risk of SP in the North, it is positively associated with subjective poverty in the Centre and is negatively associated with this risk in the South. For SMD, we note a negative effect of age in the North-West and South, while the opposite is true for the North-East and the Centre.

Having a female head of household significantly affects the probability of SP in the North-West, where it increases the likelihood by 2.2 p.p., while the effect is negligible in the other macro-regions. As for SMD, the effect is negative in

the Centre, although with a low magnitude (-0.9 p.p.), while it is positive in the South ($+2.2$ p.p.). Overall, there is no clear disadvantage of female-headed households across macro-regions for SP and SMD (confirmed by the AMEs for Italy; see Table A1), while this emerged more clearly for AROP.

As for household composition, being married—where significant—reduces all risks investigated. Notably, we find an opposite effect of being single on the risk of SP in all macro-regions, with the partial exception of the Centre ($+2.9$ p.p.), and in all macro-regions for SMD (not significant in the North-East). This finding for single households is in line with the existing literature (see, for instance, Fusco et al., 2010, and Mussida and Parisi, 2021).

Interestingly, we note that while having children in the age range of 0–3 increases the risk of SP in the North ($+13.9$ p.p. in the North-West and $+8.2$ p.p. in the North-East) and SMD in the North-West and Centre, having children aged 4–15 increases only the risk of SP in the North-West ($+7.7$ p.p.) and reduces the risk in the South (-6 p.p.). Combined with the AMEs for AROP, these results possibly suggest the effectiveness of child-related policies to support households after childbirth (AROP's reducing effect for children aged 0–3), as well as their inefficacy in preventing SMD. Likely, these measures are effective only on current income (in the short-run) after childbirth and not on permanent income (in the long-run), as measured through the lack of the items included in the SMD definition.

The presence of disabled persons in the household—in contrast to what we found for AROP—is positively associated with the probability of being subjectively poor in all macro-regions (while this does not exert a role on SMD), while the presence of elderly persons reduces the risk of SP (and SMD only in the North). For the presence of disabled persons, the findings suggest that indirect (long-term or permanent) impacts of the presence of disabled persons, related to the negative economic effect of caring activities on other household members'

labour market participation—as found by Parodi and Sciulli (2008) and Bratti and Staffolani (2012)—might be at work. While the role of elderly pensions in lifting up poor households above the low-income cut-off (OECD, 1998, chapter VI pp 171–185; Jenkins 2000), as well as their role in reducing the poverty of cohabiting household members, and especially of children (Diris et al., 2017), has already been reported (and we confirm this in Table 2, Section 5.1), here we show its relevance in Italy also for the other poverty measures (namely, subjective poverty and SMD).

Finally, we note that being a homeowner protects against both the risk of SP and AMD, especially in the South. The same effect was found for AROP.

All in all, it is crucial to analyse the risk of being either subjectively poor or severely materially deprived separately by macro-region as important differences emerge (also with respect to the findings for AROP), especially for the role of state dependence and initial conditions.

5.3. AROP indicator by macro-regional poverty line

In this section, we briefly present results of the analysis of poverty using the AROP indicator based on macro-regional poverty lines (Table A2). This exercise may be useful in the presence of significant differences in price levels across regions to reduce the risk of over(under)-representation of poverty in the poorer (richer) areas in the country. The same income level, in fact, may determine very different personal well-being in the presence of heterogeneous purchasing power. An alternative and more direct strategy would have been to correct household income through the purchasing power parities indicators, but to the best of our knowledge these are not available at the macro-regional level.

Once macro-regional poverty lines are considered, differences in poverty rates

strongly decrease. Through comparison with the evidence in Table 1, we note that the AROP indicator increases in the North (North-West from 14.9% to 17%, North-East from 11.7% to 15.2%), while in the Centre it lowers from 16.6% to 16.4%, and in the South from 34.3% to 18.2%. Despite the relevant decrease in the poverty rate in the South, our estimates confirm much of the evidence emerging from the previous analysis, albeit with some exceptions.

The most important exception is that genuine state dependence is now quite homogeneous across macro-regions, being higher in the Northern regions and lower in the Centre and Southern Italy, when compared to evidence emerging from the analysis based on a single national poverty line (Table 2). However, our estimates confirm that the scarring effect of poverty is increasing over time and is particularly strong in Southern regions. Our results also confirm the importance of educational investment and show that it is particularly effective in the Centre and South of Italy. In addition, the positive role of employment stability in preventing poverty is demonstrated for all macro-regions except the North-East, where the role of employment appears to be quite modest. Interestingly, the analysis suggests that temporary employment may be even more important than permanent employment to prevent poverty in Southern regions. Finally, while the role of age, gender, and household structure is consistent with that emerging from the national AROP indicator, some exceptions emerge in the South, where young people and the presence of disabled household members appear to increase the risk of poverty.

Conclusions

Poverty is a long-standing issue in many European countries. Despite the institutional commitment to fight poverty and, more generally, social exclusion, the

phenomenon increased between the Great Recession and the current pandemic. Understanding the determinants of poverty and its persistence is crucial to design effective policies against poverty. In this work, we analysed a four-year panel sample to explore the phenomenon of poverty in Italy, a country characterized by longstanding territorial dualism. For this reason, we carry out a novel analysis by macro-region. As poverty is a multifaceted and complex phenomenon, we reproduce the same econometric analysis using three different popular poverty measures: at-risk-of-poverty, subjective poverty, and severe material deprivation.

We wanted to identify the factors determining the risk of poverty and its persistence as crucial to the design of effective strategies against poverty. Interesting similarities and differences across indicators and macro-areas emerge. As for the former, a common finding across the poverty measures investigated is the presence of state dependence in the South, as well as of an increasing scarring effect. This confirms that social exclusion is like a trap for individuals residing in the South of Italy and highlights the need for preventative measures, since once one enters into either poverty or material deprivation it is quite difficult to escape. For the other macro-areas, instead, we note differences in the significance and magnitude of both state dependence and scarring effects across the poverty measures.

Another common finding, which emerges from the observed heterogeneity, is associated with the role of education and employment conditions within the household. The protective role of education, and especially higher education, against social exclusion is confirmed, as it is negatively associated with all risks investigated and in all areas, although with different magnitudes. Employment, and especially permanent employment, reduces all risks in all macro-regions. The findings for observed heterogeneity, as measured by other individual and household characteristics such as the age and gender of the head of household, the presence of children by age, disabled people, elderly persons, and being a

homeowner, pinpoint some differences across indicators and macro-areas.

All in all, our findings suggest that the geographical divide of Italy needs to be considered when exploring the factors affecting poverty, as this might help policymakers. The disadvantage of the South in terms of poverty persistence and the scarring effect suggest that long-term and structural policy interventions are needed to fight poverty, as policies supporting education and/or employment, although useful, might not be enough to eradicate poverty.

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Table 1 Descriptive statistics

	Italy		North-West		North-East		Centre		South	
	Mean	Std Dev.	Mean	Std Dev.	Mean	Std Dev.	Mean	Std Dev.	Mean	Std Dev.
AROP time t	0.199	0.400	0.151	0.358	0.116	0.320	0.166	0.372	0.342	0.474
Subjective poverty time t	0.288	0.453	0.268	0.443	0.185	0.388	0.248	0.432	0.426	0.494
Severe material deprivation time t	0.100	0.301	0.075	0.263	0.056	0.230	0.074	0.262	0.185	0.388
HH aged less than 25	0.018	0.134	0.021	0.144	0.019	0.135	0.016	0.127	0.017	0.131
HH aged 25-34	0.093	0.290	0.091	0.287	0.092	0.290	0.092	0.288	0.097	0.296
HH aged 35-44	0.199	0.399	0.199	0.399	0.200	0.400	0.215	0.411	0.184	0.388
HH aged 45-54	0.258	0.438	0.252	0.434	0.271	0.445	0.269	0.443	0.243	0.429
HH aged 55-64	0.194	0.395	0.192	0.394	0.185	0.389	0.174	0.379	0.220	0.414
HH aged more than 64	0.238	0.426	0.245	0.430	0.232	0.422	0.234	0.424	0.238	0.426
HH female	0.341	0.474	0.339	0.473	0.338	0.473	0.365	0.481	0.324	0.468
HH low educated	0.406	0.491	0.399	0.490	0.381	0.486	0.348	0.476	0.484	0.500
HH middle educated	0.419	0.493	0.435	0.496	0.426	0.494	0.456	0.498	0.368	0.482
HH highly educated	0.175	0.380	0.166	0.372	0.194	0.395	0.197	0.398	0.149	0.356
HH married	0.634	0.482	0.620	0.465	0.648	0.478	0.623	0.485	0.644	0.479
Single	0.169	0.375	0.187	0.390	0.170	0.376	0.178	0.382	0.145	0.352
Children aged 0-3	0.069	0.254	0.069	0.253	0.075	0.263	0.070	0.255	0.065	0.246
Children aged 4-15	0.272	0.445	0.268	0.443	0.278	0.448	0.278	0.448	0.265	0.441
Number of persons with disabilities	0.100	0.330	0.091	0.322	0.092	0.320	0.102	0.330	0.113	0.346
Number of elderly	0.493	0.750	0.489	0.749	0.486	0.755	0.517	0.765	0.480	0.734
Homeowner	0.755	0.430	0.718	0.450	0.789	0.408	0.765	0.424	0.752	0.432
Number of permanent employed	0.697	0.776	0.723	0.790	0.782	0.821	0.727	0.770	0.576	0.716
Number of temporary employed	0.139	0.393	0.107	0.330	0.161	0.441	0.135	0.380	0.154	0.411
Number of self-employed	0.221	0.487	0.230	0.506	0.212	0.481	0.215	0.473	0.223	0.486
North-West	0.249	0.432								
North-East	0.227	0.419								
Centre	0.248	0.432								
South	0.276	0.447								
Observations	61547		15226		13868		15165		16869	

Source: Authors' calculations from EU-SILC 2015-2018 data.

Table 2 Estimates of the determinants of at risk of poverty by Italian macro-regions

	North-West		North-East		Centre		South		
	AME	s.e.	AME	s.e.	AME	s.e.	AME	s.e.	
Poverty time t-1	0.052	0.012	***	0.029	0.011	***	0.085	0.016	***
Poverty time 0	0.137	0.005	***	0.110	0.004	***	0.144	0.009	***
HH aged less than 25							base-category		
HH aged 25-34	-0.018	0.013		0.005	0.013		-0.010	0.018	
HH aged 35-44	-0.009	0.013		0.001	0.013		-0.010	0.018	
HH aged 45-54	-0.014	0.013		0.004	0.013		-0.011	0.018	
HH aged 55-64	-0.013	0.013		0.008	0.013		-0.030	0.018	*
HH aged more than 64	-0.005	0.015		-0.004	0.014		-0.014	0.020	
HH female	-0.010	0.005	**	0.014	0.004	***	0.010	0.006	*
HH low educated							base-category		
HH middle educated	-0.023	0.005	***	-0.013	0.004	***	-0.046	0.006	***
HH highly educated	-0.026	0.007	***	-0.024	0.006	***	-0.090	0.009	***
HH married	-0.029	0.013	**	-0.064	0.014	***	-0.057	0.017	***
Single	-0.023	0.007	***	-0.013	0.007	**	-0.025	0.009	***
Children aged 0-3	-0.041	0.019	**	-0.002	0.012		0.005	0.028	
Children aged 4-15	0.035	0.016	**	-0.008	0.014		-0.037	0.022	*
Number of persons with disabilities	-0.017	0.010	*	-0.006	0.008		0.006	0.012	
Number of elderly	-0.033	0.006	***	-0.018	0.005	***	-0.043	0.006	***
Homeowner	-0.031	0.005	***	-0.029	0.005	***	-0.052	0.006	***
Number of permanent employed	-0.054	0.009	***	-0.014	0.008	*	-0.074	0.013	***
Number of temporary employed	-0.026	0.009	***	-0.012	0.006	*	-0.037	0.012	***
Number of self-employed	-0.035	0.010	***	-0.004	0.010		-0.041	0.016	***

Source: Authors' calculations from EU-SILC 2015-2018 data. Note: *p < .10, **p < .05, ***p < .01.

Table 3 Estimates of the determinants of subjective poverty by Italian macro-regions

	North-West		North-East		Centre		South	
	AME	s.e.	AME	s.e.	AME	s.e.	AME	s.e.
Subjective poverty time t-1	-0.010	0.015	0.000	0.014	0.037	0.016	0.087	0.017
Subjective poverty time 0	0.209	0.013	0.181	0.011	0.188	0.014	0.185	0.016
HH aged less than 25					base-category			
HH aged 25-34	0.011	0.033	-0.001	0.027	0.174	0.038	-0.060	0.041
HH aged 35-44	0.046	0.032	-0.025	0.027	0.181	0.038	-0.114	0.041
HH aged 45-54	0.049	0.032	-0.023	0.026	0.201	0.037	-0.103	0.040
HH aged 55-64	0.010	0.033	-0.041	0.027	0.148	0.038	-0.128	0.041
HH aged more than 64	0.053	0.037	-0.025	0.030	0.090	0.040	-0.154	0.045
HH female	0.022	0.010	0.011	0.008	-0.006	0.010	0.002	0.011
HH low educated					base-category			
HH middle educated	-0.087	0.010	-0.057	0.009	-0.077	0.010	-0.123	0.011
HH highly educated	-0.169	0.016	-0.096	0.012	-0.121	0.014	-0.236	0.017
HH married	0.019	0.034	0.006	0.028	0.029	0.029	-0.075	0.036
Single	-0.030	0.017	-0.039	0.014	0.029	0.016	-0.047	0.019
Children aged 0-3	0.139	0.046	0.082	0.031	0.018	0.042	0.011	0.048
Children aged 4-15	0.077	0.036	-0.010	0.028	-0.045	0.037	-0.060	0.036
Number of persons with disabilities	0.069	0.019	0.066	0.015	0.062	0.017	0.024	0.017
Number of elderly	-0.091	0.012	-0.052	0.008	-0.044	0.009	-0.053	0.011
Homeowner	-0.115	0.010	-0.080	0.009	-0.062	0.011	-0.141	0.012
Number of permanent employed	-0.040	0.017	-0.016	0.015	-0.031	0.018	-0.140	0.019
Number of temporary employed	-0.002	0.020	-0.031	0.015	-0.052	0.019	-0.010	0.021
Number of self-employed	-0.034	0.025	0.007	0.023	-0.072	0.028	-0.023	0.028

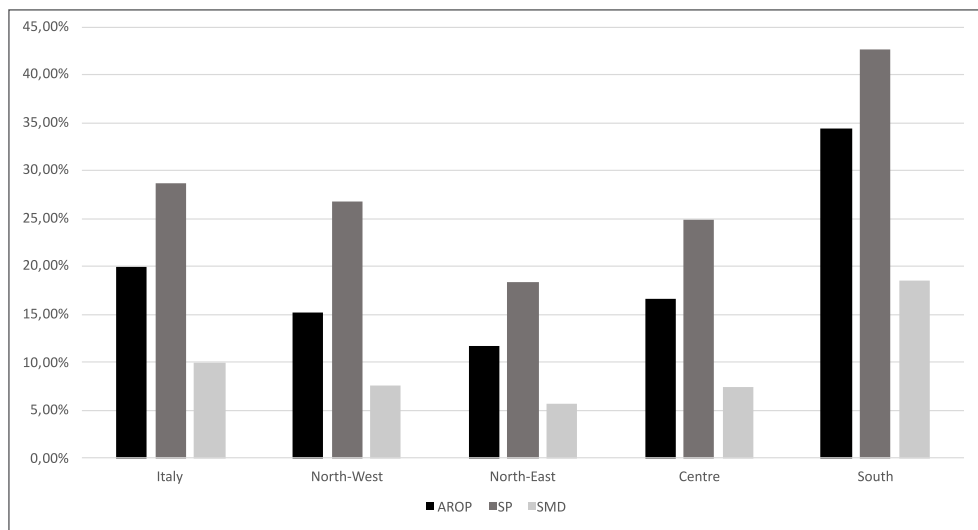
Source: Authors' calculations from EU-SILC 2015-2018 data. Note: *p < .10, **p < .05, ***p < .01.

Table 4 Estimates of the determinants of severe material deprivation by Italian macro-regions

	North-West		North-East		Centre		South				
	AME	s.e.	AME	s.e.	AME	s.e.	AME	s.e.			
Severe material deprivation time t-1	0.050	0.008	***	0.034	0.008	***	-0.004	0.009	0.042	0.015	***
Severe material deprivation time 0	0.039	0.008	***	0.039	0.008	***	0.064	0.007	0.118	0.012	***
HH aged less than 25							base-category				
HH aged 25-34	-0.045	0.015	***	0.037	0.019	*	0.005	0.017	-0.073	0.024	***
HH aged 35-44	-0.042	0.014	***	0.022	0.019		0.011	0.017	-0.060	0.024	**
HH aged 45-54	-0.031	0.014	**	0.038	0.018	**	0.018	0.017	-0.050	0.024	**
HH aged 55-64	-0.024	0.014	*	0.041	0.019	**	0.015	0.017	-0.061	0.025	**
HH aged more than 64	-0.025	0.016		0.044	0.020	**	-0.009	0.018	-0.072	0.027	***
HH female	0.004	0.005		0.000	0.005		-0.009	0.005	0.022	0.008	***
HH low educated							base-category				
HH middle educated	-0.020	0.005	***	-0.020	0.005	***	-0.026	0.005	-0.069	0.008	***
HH highly educated	-0.034	0.008	***	-0.039	0.008	***	-0.056	0.008	-0.136	0.014	***
HH married	-0.040	0.023	*	0.023	0.019		-0.029	0.015	-0.102	0.025	***
Single	0.017	0.008	**	0.006	0.008		0.024	0.007	0.034	0.012	***
Children aged 0-3	0.071	0.033	**	0.036	0.024		0.065	0.028	0.007	0.035	**
Children aged 4-15	-0.034	0.025		0.007	0.023		0.036	0.020	-0.001	0.026	*
Number of persons with disabilities	0.011	0.012		0.007	0.010		0.005	0.008	0.004	0.012	
Number of elderly	-0.031	0.006	***	-0.008	0.005	*	0.006	0.004	-0.008	0.007	
Homeowner	-0.040	0.005	***	-0.033	0.005	***	-0.032	0.005	-0.079	0.008	***
Number of permanent employed	-0.025	0.012	**	-0.031	0.012	***	0.004	0.010	-0.064	0.014	***
Number of temporary employed	-0.023	0.013	*	-0.013	0.010		-0.035	0.010	-0.034	0.014	**
Number of self-employed	-0.029	0.017	*	0.009	0.018		-0.034	0.015	-0.075	0.021	***

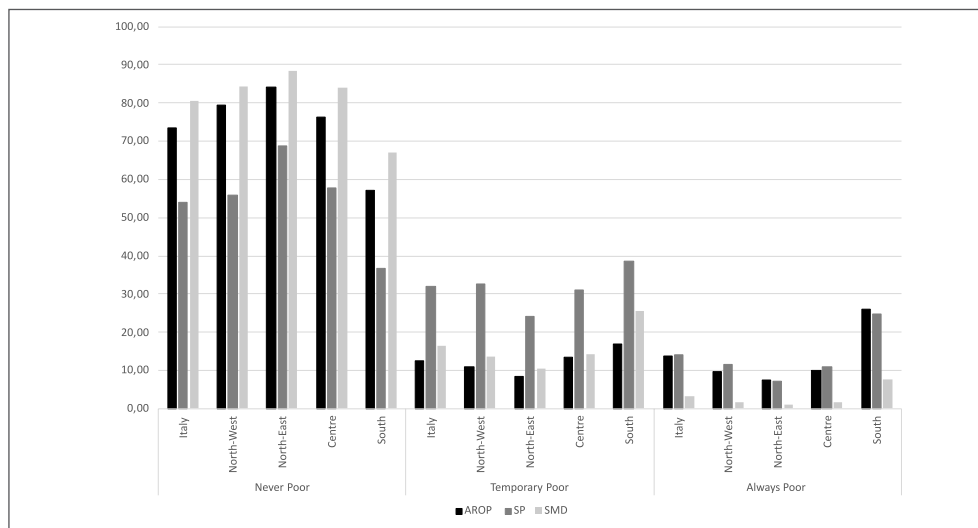
Source: Authors' calculations from EU-SILC 2015-2018 data. Note: *p < .10, **p < .05, ***p < .01.

Figure 1 Poverty indicators by Italian macroregions



Source: Authors' calculations from EU-SILC 2015-2018 data

Figure 2 Poverty patterns across Italian macroregions



Source: Authors' calculations from EU-SILC 2015-2018 data

Table A1 Estimates of the determinants of poverty in Italy: at risk of poverty, subjective poverty and severe material deprivation indicators

	AROP			Subjective poverty			Severe material deprivation		
	AME	s.e.		AME	s.e.		AME	s.e.	
Poverty time t-1	0.062	0.007	***	0.033	0.008	***	0.031	0.007	***
Poverty time 0	0.158	0.003	***	0.198	0.007	***	0.068	0.005	***
HH aged less than 25				base-category					
HH aged 25-34	0.000	0.008		0.028	0.017	*	-0.028	0.009	***
HH aged 35-44	-0.007	0.008		0.017	0.017		-0.025	0.009	***
HH aged 45-54	-0.006	0.008		0.030	0.017	*	-0.014	0.009	*
HH aged 55-64	-0.019	0.008	**	-0.007	0.017		-0.015	0.009	*
HH aged more than 64	-0.005	0.009		-0.019	0.019		-0.028	0.010	***
HH female	0.007	0.003	***	0.009	0.005	*	0.003	0.003	
HH low educated				base-category					
HH middle educated	-0.034	0.003	***	-0.091	0.005	***	-0.034	0.003	***
HH highly educated	-0.055	0.004	***	-0.159	0.007	***	-0.065	0.005	***
HH married	-0.025	0.007	***	-0.008	0.016		-0.040	0.010	***
Single	-0.029	0.004	***	-0.022	0.008	***	0.021	0.004	***
Children aged 0-3	-0.024	0.010	**	0.060	0.021	***	0.038	0.015	**
Children aged 4-15	0.005	0.009		-0.015	0.017		0.002	0.012	
Number of persons with disabilities	0.000	0.005		0.053	0.009	***	0.005	0.005	
Number of eldersies	-0.037	0.003	***	-0.059	0.005	***	-0.006	0.003	**
Homeowner	-0.038	0.003	***	-0.100	0.005	***	-0.047	0.003	***
Number of permament employed	-0.060	0.005	***	-0.056	0.009	***	-0.028	0.006	***
Number of temporary employed	-0.031	0.005	***	-0.025	0.010	***	-0.028	0.006	***
Number of self-employed	-0.030	0.006	***	-0.032	0.013	**	-0.035	0.009	***
North-West				base-category					
North-East	-0.012	0.004	***	-0.032	0.006	***	-0.006	0.003	*
Centre	0.012	0.004	***	0.006	0.006		0.006	0.003	**
South	0.037	0.004	***	0.074	0.007	***	0.055	0.004	***

Source: Authors' calculations from EU-SILC 2015-2018 data. Note: *p < .10, **p < .05, ***p < .01.

Appendix

Table A2 Estimates of the determinants of at risk of poverty by Italian macro-regions: Poverty lines at macroregional level

	North-West		North-East		Centre		South					
	AME	s.e.	AME	s.e.	AME	s.e.	AME	s.e.				
Poverty line t-1	0.068	0.015	***	0.052	0.015	***	0.061	0.014	***	0.054	0.012	***
Poverty line 0	0.152	0.006	***	0.127	0.006	***	0.153	0.008	***	0.171	0.006	***
HH aged less than 25												
HH aged 25-34	-0.011	0.015		0.007	0.017		-0.004	0.017		-0.053	0.017	***
HH aged 35-44	-0.005	0.015		0.021	0.016		-0.003	0.017		-0.059	0.016	***
HH aged 45-54	0.015	0.014		0.024	0.016		-0.015	0.017		-0.038	0.016	**
HH aged 55-64	0.010	0.015		0.031	0.017	*	-0.027	0.018		-0.069	0.017	***
HH aged more than 64	0.004	0.017		0.014	0.018		-0.005	0.019		-0.072	0.019	***
HH female	-0.005	0.005		0.020	0.005	***	0.010	0.006	*	-0.005	0.005	
HH low educated												
HH middle educated	-0.021	0.005	***	-0.018	0.005	***	-0.043	0.006	***	-0.041	0.006	***
HH highly educated	-0.030	0.008	***	-0.034	0.007	***	-0.087	0.009	***	-0.061	0.009	***
HH married	-0.039	0.016	**	-0.086	0.017	***	-0.051	0.016	***	-0.015	0.015	
Single	-0.021	0.008	***	-0.023	0.008	***	-0.025	0.009	***	-0.025	0.009	***
Children aged 0-3	-0.054	0.024	**	-0.021	0.015		-0.015	0.027		-0.013	0.018	
Children aged 4-15	0.018	0.018		0.035	0.017	**	-0.029	0.021		0.010	0.015	
Number of persons with disabilities	-0.007	0.011		-0.003	0.010		-0.003	0.012		0.027	0.009	***
Number of elderly	-0.030	0.006	***	-0.022	0.005	***	-0.046	0.006	***	-0.050	0.006	***
Homeowner	-0.039	0.006	***	-0.036	0.006	***	-0.051	0.006	***	-0.040	0.006	***
Number of permanent employed	-0.054	0.010	***	0.000	0.009		-0.082	0.012	***	-0.056	0.009	***
Number of temporary employed	-0.036	0.010	***	-0.020	0.008	**	-0.028	0.012	**	-0.070	0.010	***
Number of self-employed	-0.046	0.011	***	0.010	0.012		-0.043	0.015	***	-0.042	0.012	***

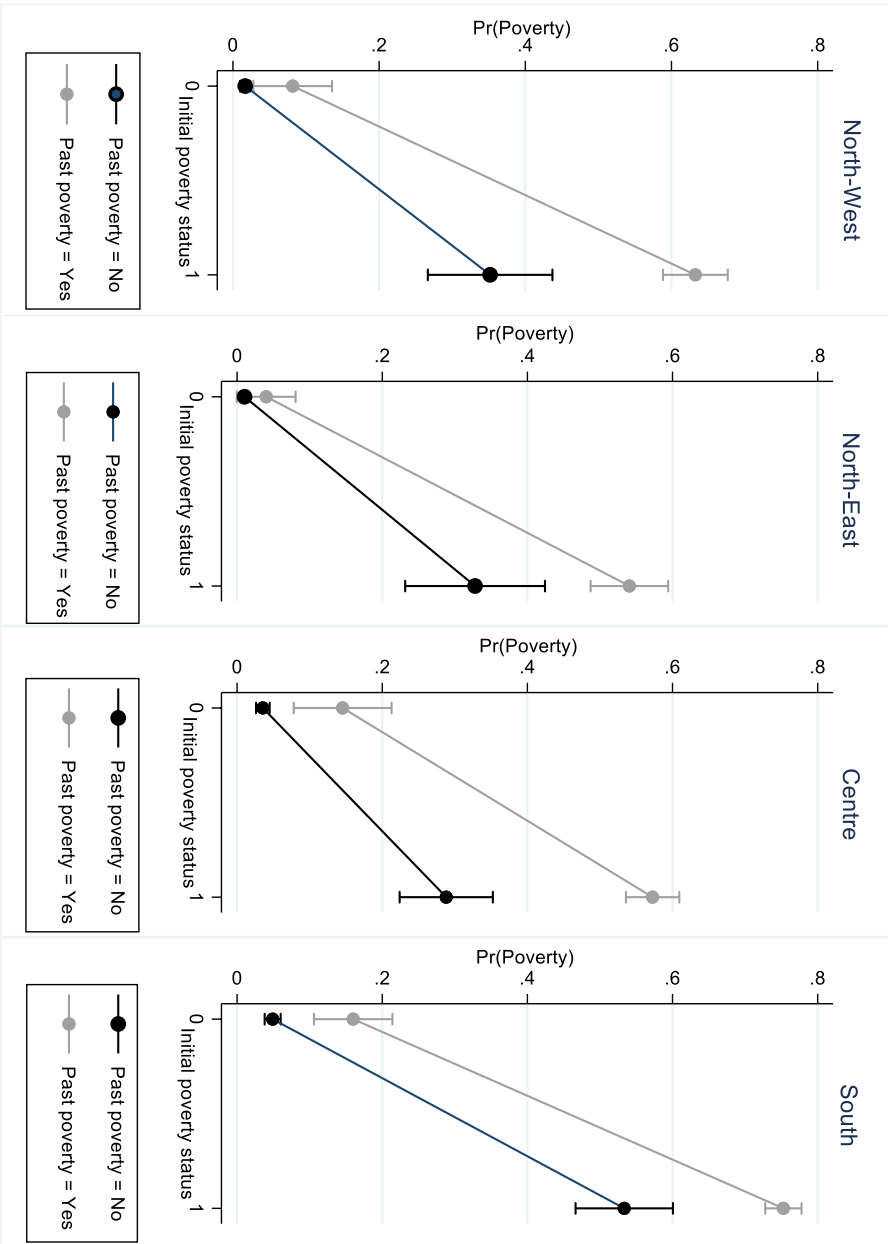
Source: Authors' calculations from EU-SILC 2015-2018 data. Note: * p < .10, ** p < .05, *** p < .01

Table A3 Estimates of the determinants of at risk of poverty by Italian macro-regions: An analysis of the intensity of poverty

	North-West			North-East			Centre			South						
	Poverty	Severe poverty	AME	Poverty	Severe poverty	AME	Poverty	Severe poverty	AME	Poverty	Severe poverty	AME				
	AME	AME	AME	AME	AME	AME	AME	AME	AME	AME	AME	AME				
Poverty-t-1	0.021	***	0.021	***	0.014	*	0.015	***	0.063	***	0.043	***	0.042	***	0.064	***
Severe poverty t-1	0.040	***	0.041	***	0.032	*	0.032	***	0.073	***	0.051	***	0.066	***	0.100	***
Poverty time 0	0.196	***	0.095	***	0.149	***	0.052	***	0.125	***	0.062	***	0.179	***	0.087	***
Severe poverty time 0	0.256	***	0.165	***	0.273	***	0.163	***	0.199	***	0.134	***	0.265	***	0.334	***
HH aged less than 25																
HH aged 25-34	-0.010	**	-0.020	**	0.000		0.000		-0.006		-0.007		-0.003		-0.012	
HH aged 35-44	-0.007		-0.013		0.001		0.003		-0.006		-0.007		-0.009	*	-0.031	**
HH aged 45-54	-0.006		-0.013		0.002		0.003		-0.006		-0.007		-0.007		-0.025	*
HH aged 55-64	-0.005		-0.010		0.002		0.005		-0.016	**	-0.019	**	-0.017	***	-0.060	***
HH aged more than 64	-0.004		-0.008		-0.002		-0.005		-0.015	*	-0.018	*	-0.010	*	-0.036	**
HH female	-0.002		-0.003		0.005	***	0.011	***	0.006	**	0.007	**	0.003	**	0.011	**
HH low educated																
HH middle educated	-0.005	***	-0.011	***	-0.003	**	-0.007	**	-0.019	***	-0.023	***	-0.012	***	-0.043	***
HH highly educated	-0.005	**	-0.010	**	-0.006	***	-0.014	***	-0.042	***	-0.051	***	-0.020	***	-0.070	***
HH married	-0.011	**	-0.023	***	-0.017	***	-0.036	***	-0.033	***	-0.040	***	0.002	0.002	0.007	0.007
Single	-0.008	***	-0.017	***	-0.003		-0.006		-0.007	*	-0.009	*	-0.010	***	-0.036	***
Children aged 0-3	-0.012	**	-0.025	**	-0.002		-0.004		-0.010		-0.012		-0.011	**	-0.038	**
Children aged 4-15	0.010	**	0.020	**	-0.007	*	-0.016	*	-0.024	**	-0.029	**	0.003	0.003	0.012	0.012
Number of persons with disabilities	-0.003		-0.007		-0.001		-0.003		0.002		0.002		0.003	0.003	0.010	0.010
Number of elderly	-0.013	***	-0.026	***	-0.004	***	-0.010	***	-0.018	***	-0.022	***	-0.013	***	-0.044	***
Homeowner	-0.010	***	-0.021	***	-0.008	***	-0.017	***	-0.021	***	-0.025	***	-0.009	***	-0.032	***
Number of permanent employed	-0.020	***	-0.040	***	-0.009	***	-0.019	***	-0.037	***	-0.045	***	-0.019	***	-0.067	***
Number of temporary employed	-0.010	***	-0.020	***	-0.004	*	-0.008	**	-0.017	***	-0.020	***	-0.016	***	-0.057	***
Number of self-employed	-0.014	***	-0.029	***	-0.003		-0.006		-0.021	***	-0.026	***	-0.008	***	-0.027	***

Source: Authors' calculations from EU-SILC 2015-2018 data. Note: *p < .10, **p < .05, ***p < .01. Standard errors available upon request.

Figure A1 Predicted probabilities of being currently poor conditional on past and initial poverty status by Italian macro-regions



Source: Authors' calculations from EU-SILC 2015-2018 data.

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ECONOMIA ITALIANA 2021/3

Disuguaglianze e povertà: il caso italiano

Le disuguaglianze economiche – di reddito e di ricchezza – sono più alte di quanto non fossero due o tre decenni fa per la grande maggioranza dei paesi. Anche se non altrettanto può dirsi con certezza a livello globale, per effetto soprattutto della crescita del reddito medio e della caduta della povertà in paesi come la Cina e l'India. Con riferimento all'Italia le disuguaglianze "interne" nei redditi disponibili, misurate con l'indice di Gini, sono passate (dati OCSE) dal 28% circa dell'inizio degli anni'90 al 33% degli anni più recenti. **Giuseppe De Arcangelis, Maurizio Franzini e Alessandro Pandimiglio**, editor di questo numero, sottolineano che per comprendere le cause di questo fenomeno occorre *"interrogarsi sulle caratteristiche del processo di crescita economica e il loro impatto sulle disuguaglianze. Adottando questa prospettiva non si può non fare riferimento al cambiamento tecnologico e all'affermarsi delle tecnologie digitali, da un lato, e ai processi di globalizzazione, dall'altro"*.

A questi due fattori certamente si aggiungono i cambiamenti istituzionali e nelle regole del gioco che, condizionati dalla tecnologia e dalla globalizzazione, hanno notevolmente contribuito ad aggravare le disuguaglianze, indebolendo la forza contrattuale dei lavoratori e generando tolleranza rispetto all'affermarsi dei monopoli in molti mercati.

Su tutte queste tematiche molto resta da precisare e da conoscere. In questo volume di Economia Italiana vengono pubblicati lavori che possono aiutare a porsi le domande più rilevanti e che contribuiscono a migliorare la nostra capacità di rispondere ad esse. **Mussida e Sciulli** mettono in evidenza lo svantaggio delle regioni del Sud anche nella persistenza nello stato di povertà. **Curci e Savegnago** offrono una chiara esposizione delle finalità e delle problematiche derivanti dall'introduzione nel nostro paese dell'assegno unico e universale (AUU). **Aprea e Raitano** illustrano i problemi che sorgono a definire e misurare in modo univoco la povertà. **Gravina e Vallanti** affrontano l'impatto dell'automazione sull'occupazione e sulla distribuzione dei redditi. **Aliprandi, Andreano, Benedetti, Pandimiglio e Piersimoni** si occupano del rapporto tra crescita economica e disuguaglianza nei redditi. Nel suo intervento il Presidente dell'Istat, **Gian Carlo Blangiardo**, sottolinea che la disuguaglianza è un fenomeno multidimensionale e ci ricorda l'importanza dei dati sia per conoscerla nelle sue molteplici caratteristiche, sia per valutare gli effetti che hanno le politiche dirette a contrastarla.

ECONOMIA ITALIANA nasce nel 1979 per approfondire e allargare il dibattito sui nodi strutturali e i problemi dell'economia italiana, anche al fine di elaborare adeguate proposte strategiche e di *policy*. L'Editrice Minerva Bancaria è impegnata a riprendere questa sfida e a fare di Economia Italiana il più vivace e aperto strumento di dialogo e riflessione tra accademici, *policy makers* ed esponenti di rilievo dei diversi settori produttivi del Paese.