

GATEWAY TO
**GLOBAL
AGING
DATA**

g2aging.org

Gateway Policy Explorer: Retirement Series

Italy

Public Old-Age Social Assistance Plan Details 1992-2022

Authors

Giacomo Rebellato
David Knapp
Qinyi Ouyang

Contributors

Agar Brugiavini
Jinkook Lee
Drystan Phillips
Maciej Lis[†]

Version: 2.0 (August 2023)

This project is funded by the National Institutes of Health, National Institute of Aging, RO1 AG030153.

Please cite as “Gateway to Global Aging Data (2024). *Gateway Policy Explorer: Italy, Public Old-Age Social Assistance Plan Details, 1992-2022*, Version: 2.0 (August 2023), University of Southern California, Los Angeles. <https://doi.org/10.25553/gpe.ret.sa.ita>”

Preface

This document is intended for researchers who want to understand the evolution of policy or the policy in place at a particular point in time. This document is not intended for financial advice or to aid in decision-making. The authors have made significant effort to identify and collect historical information pertaining to these policies, to accurately represent these policies, and to communicate how policies may interact to determine legal requirements, eligibility for benefits, and/or benefits levels. The policies presented in this document focus on rules applicable to most individuals aged 50 and older from 1992. Many systems include special policies or alternative eligibility rules for specific groups. We encourage all users to complete their own review of literature in this area depending on the research questions they have in mind.

If you have feedback or questions or identify an error, please contact policy@g2aging.org.

Background — Gateway Policy Explorer: Retirement Series

The *Gateway Policy Explorer* (<http://g2aging.org/policy-explorer>) is part of the Gateway to Global Aging Data (<http://g2aging.org>) project. The *Retirement Series* captures historical policy that affects the birth cohorts of respondents in the surveys covered by the Gateway. It was motivated by the rapid evolution of policies affecting older people across the world. As the Health and Retirement Study (HRS) began in 1992 and many of the international network of studies (HRS-INS) cover more than a decade, understanding the policies in place at the time of the survey has become more demanding for researchers.

Why are we tracking past policy? Individuals make choices based on current policies and the outcomes we see today may reflect responses to past policies. When interpreting the survey responses of individuals, an understanding of the policy environment under which those individuals operate is critical. The collection of contextual information in the *Gateway Policy Explorer* aims to support researchers who want to understand or use policy changes in their research and provide context for longitudinal or cross-country differences. Over the period 2023–2026 the *Gateway Policy Explorer* will be expanded to include information on retirement, long-term care, education, and other policies affecting the life cycle.

The key dimensions to the *Gateway Policy Explorer: Retirement Series* are country and time. We prioritize data collection for each country based on its first interview wave and are continuing to expand our data collection back in time to 1992, the earliest survey date in the HRS-INS.

A separate document, like this one, is developed for each country and each broad category of policies covered in the *Gateway Policy Explorer: Retirement Series*.

Author and Contributor Disclaimers

† The opinions expressed here are those of authors and do not necessarily reflect the views of the OECD or of its member countries.

Italy

Old-Age Social Assistance
Plan details 1992-2022 * †

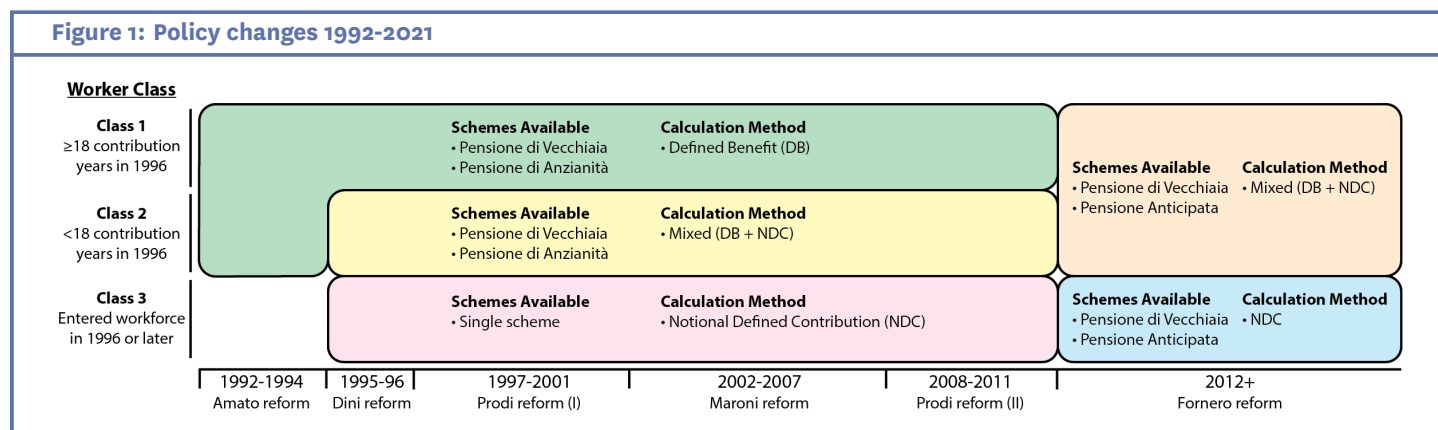
In Italy, old-age non-contributory social assistance is known as a Social Allowance (Pensione Sociale/Assegno sociale). It is provided to all Italian citizens over age 65 living in Italy that have income below a certain yearly-determined threshold. A secondary form of old-age social assistance, a guaranteed minimum pension, is also available to individuals eligible for Italy's defined benefit plan (i.e., individuals contributing to the pension system prior to 1996). As the defined benefit pension phases out for younger cohorts, old-age social assistance will be based only on the social allowance. Old-age social assistance is administered by Italy's National Social Security Institute (INPS).

Key Dates

First law: 1919

Major changes since 1992: 1995, 2001

The figure below presents an overview of the reforms and policy changes that took place during the time periods included in this document. It identifies policy differences by a person's pension benefit "class", which is determined by work history at the start of 1996. For each class, the figure summarizes the eligibility tracks available and applicable benefit calculation methods at different points in time.



Source: Authors' interpretation of historical policy changes.

Note: The horizontal axis represents the time period included in this document divided into key reform periods. The vertical axis represents the different pension benefit "classes" that are defined by work history in 1996.

Contents

Chapter 1: Policy enacted 1992-1995

| | |
|-------------|---|
| Overview | 5 |
| Eligibility | 5 |
| Benefits | 6 |

Chapter 2: Policy enacted 1996-2001

| | |
|-------------|----|
| Overview | 8 |
| Eligibility | 8 |
| Benefits | 10 |

* If you have questions or suggestions, please contact policy@g2aging.org.

† Detailed information and definitions are provided in tables, formulas and a glossary at the end of this document. To facilitate switching back and forth, this document is designed with hyperlinks. Most PDF readers have shortcuts that permit a reader to return to the previous location after selecting a hyperlink. In Adobe Acrobat on a PC: "Alt" + "←"; In Adobe Acrobat on a MAC: "command" + "←"; In Preview on a MAC: "command" + "[".

| | |
|---|-----------|
| Chapter 3: Policy enacted 2002-2022 | 11 |
| Overview | 11 |
| Eligibility | 12 |
| Benefits | 13 |
| Tables and Formulas | 15 |
| Figure 1: Policy changes 1992-2021 | 15 |
| Table 1: Social Allowance (Pensione Sociale) - Annual Income Thresholds | 16 |
| Table 2: Minimum Pension (Trattamento Minimo) - Maximum Benefit Levels | 17 |
| Table 3: Minimum Pension - Annual Income Thresholds (for Pensions Starting Before January 1, 1994 and During 1994) | 18 |
| Table 4: Minimum Pension - Annual Income Thresholds (for Pensions Starting After January 1, 1995) | 19 |
| Table 5: Maggiorazione Sociale of the Minimum Pension (65 years and older) - Values and Annual Income Thresholds | 20 |
| Table 6: Maggiorazione Sociale of the pensione Sociale - Values and Annual Income Thresholds | 21 |
| Box 1: Sources of Income Subject to Means-Test in Social Assistance Programs | 22 |
| Formula 1: Benefit Formula for Social Allowance (Pensione Sociale) Benefits | 22 |
| Table 7: Social Allowance (Pensione Sociale) - Maximum Benefit Levels | 23 |
| Formula 2: Formula for Supplemental Benefits Paid Due to Minimum Pension Qualification (Pension Starting Before 1994) | 24 |
| Formula 3: Formula for Supplemental Benefits Paid Due to Minimum Pension Qualification (Pension Starting During 1994) | 24 |
| Formula 4: Formula for Supplemental Benefits Paid Due to Minimum Pension Qualification (Pension Starting After 1994) | 25 |
| Formula 5: Consolidated Formula for Social Assistance Supplements | 26 |
| Table 8: Social Allowance (Assegno Sociale) - Annual Income Thresholds | 27 |
| Formula 6: Benefit Formula for Social Allowance (Assegno Sociale) Benefits | 27 |
| Table 9: Social Allowance (Assegno Sociale) - Maximum Benefit Levels | 28 |
| Table 10: Adjustment of Full Eligibility Age for Assegno Sociale (Social Allowance) Based on Increases in Life Expectancy | 29 |
| Formula 7: Lower Age Requirements Due to Contribution Years for Extra Increases in Social Assistance programs | 29 |
| Table 11: Maggiorazione Sociale of the Minimum Pension (70 years and older) - Values and Annual Income Thresholds | 30 |
| Table 12: Maggiorazione Sociale of the Assegno Sociale - Values and Annual Income Thresholds | 31 |
| Sources | 32 |
| Glossary of terms | 33 |
| Version information | 34 |
| Additional resources | 34 |

Chapter 1: Policy enacted 1992-1995

Overview

Old-age, non-contributory social assistance - known as a social allowance (Pensione Sociale) - is provided monthly to all Italian and EU citizens residing in Italy over the age of 65 who do not receive old-age pension benefits, based on certain income conditions.

Individuals entitled to a small old-age pension benefit under Italy's [defined benefit plan](#) (i.e., individuals contributing to the pension system prior to 1996) may also have their pension benefit increased by a minimum pension (Trattamento minimo).

In both cases, individuals with very low household income are entitled to a benefit supplement (Maggiorazione sociale), which is granted below certain income thresholds.

Note: See [Figure 1](#) for an overview of the reforms and policy changes in old-age pensions that took place during the time periods included in this document, which affect the provision of social assistance old-age benefits. The figure identifies policy differences by a person's pension benefit "class", which is determined by work history at the start of 1996. For each class, the figure summarizes the eligibility tracks available and applicable benefit calculation methods at different points in time.

Eligibility

Age requirements to start benefits without penalty

- [Full eligibility age \(FEA\)](#)

Social allowance ([Pensione Sociale](#))

Age 65

Minimum pension (Trattamento Minimo)

Same as [SRA](#) for own old-age pension benefit:

- Age 65 for men and 60 for women under the [Pensioni di Vecchiaia eligibility track](#)
- No minimum age with 35 years of contributions under the [Pensioni di Anzianita eligibility track](#)

Minimum pension benefits are conditional to the receipt of old-age pension benefits. See policy document: *Italy, Public Own Old-Age Benefit Plan Details* for further details on eligibility for old-age pension benefits.

Requirements to be eligible to receive benefit

- **Does eligibility depend on the individual's current income (i.e., income tested)?** Answer: Yes
- **Does eligibility depend on the individual's current assets (i.e., asset tested)?** Answer: No
- **Details by benefit program:**

Social allowance ([Pensione Sociale](#))

An individual must satisfy each of the following conditions to be eligible for benefits:

- Residency and citizenship requirement: Reside in Italy and be an Italian citizen
- Age requirement: At least age 65
- Income requirement: An annual income ¹ below the individual income threshold (equal to the amount of the annual social allowance) and a couple income ¹, if married, below the couple income threshold "B" in [Table 1](#).

Minimum pension (Trattamento Minimo)

An individual is eligible for the minimum pension if they are qualified for the [defined benefit \(DB\) system](#) (i.e., [Class 1](#) and [Class 2](#) workers - see definition in policy document: *Italy Public Own Old-Age Benefit Plan Details*), are already receiving old-age pension benefits and if the following income requirements are met:

- For pensions starting before January 1, 1994:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner ² is less than 2 times the minimum pension level
- For pensions starting during 1994:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner is less than 2 times the minimum pension level
 - * If married, annual income ¹ of the couple is less than 5 times the minimum pension level
- For pensions starting after January 1, 1995:

- * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
- * Annual income ¹ of the pensioner is less than 2 times the minimum pension level
- * If married, annual income ¹ of the couple is less than 4 times the minimum pension level

Reference values can be found in the following tables:

- Minimum pension values by year: [Table 2](#)
- Income threshold values for pensions starting before January 1, 1994 and during 1994: [Table 3](#)
- Income threshold values for pensions starting after January 1, 1995: [Table 4](#)

Supplements to the social allowance and to the minimum pension

(Maggiorazione Sociale della Pensione Sociale e del Trattamento Minimo)

In addition to the requirements for social assistance eligibility, an individual must satisfy each of the following conditions to be eligible for supplements to their social assistance benefits, also known as “increases”:

- Residency and citizenship requirement: None
- Age requirement: At least age 65
- Income requirement: An annual income ¹ below the individual income threshold based on the applicable social assistance system as specified in the following tables:
 - * Minimum pension: [Table 5](#) (Maggiorazione Sociale del Trattamento Minimo)
 - * Pensione Sociale: [Table 6](#) (Maggiorazione Sociale della Pensione Sociale)

Notes:

- ¹ See [Box 1](#) for details on income sources used in the computation of income requirements relative to each program’s eligibility. Each means-tested supplemental benefit increase follows the same computation rules of its respective underlying program.
 - ² For pensions starting before January 1, 1994, income requirements account for only individual income, even if the individual is married.
- The main difference between Social Allowance provisions and Minimum Pension is that the latter is available only for those eligible for, and receiving, old-age pension benefits, which are raised to the minimum level. Social allowance provisions, instead, are available also for those who have not met the old-age pension eligibility criteria.

Benefits

- To receive a benefit, [does an individual have to claim it?](#) Answer: Yes
- To continue to receive a benefit, [does an individual have to remain qualified?](#) Answer: Yes

Factors effecting computation of benefit entitlement

- Does the benefit amount depend on the individual’s birth year (regardless of age)? Answer: Yes
- Is the benefit adjusted if an individual delays claiming it? Answer: No
- Are future benefit entitlements adjusted for [cost of living](#)? Answer: Yes
- If so, what measure is used for adjustment? CPI (country-specific measure, calculated by ISTAT under the name “FOI”)

Benefit formula

Social allowance ([Pensione Sociale](#))

Benefit payment reflects the amount necessary to bring income up to the Pensione Sociale social allowance level depending on the income of the individual and of the couple (if married). See [Formula 1](#) for calculation details. The Pensione Sociale allowance level is fixed and adjusted annually. See [Table 7](#) for allowance levels by year.

Minimum pension (Trattamento minimo)

The minimum pension supplements an individual’s own old-age pension benefit so that it is at least the minimum pension level, which is fixed and adjusted annually. See [Table 2](#) for minimum pension values by year.

The supplemental benefit can be the full or a partial amount of the minimum pension level, depending on the individual’s income and when they initially apply for benefits. See the following formulas for how to calculate the social assistance benefits from the minimum pension conditional on own old-age pension entitlements and the date a beneficiary’s own old-age pension starts:

- Pensions starting before January 1, 1994: [Formula 2](#)
- Pensions starting in 1994: [Formula 3](#)
- Pensions starting after January 1, 1995: [Formula 4](#)

Supplements to the social allowance and to the minimum pension

A person's total social allowance is the sum of their primary social assistance (i.e., social allowance or minimum pension) and these supplements to social assistance. The maximum amount of the supplements to social allowance or the minimum pension is fixed and intermittently adjusted by the Italian government. The additional benefit can be the full or a partial amount of the supplement, depending on the individual's income. See [Formula 5](#) for how to calculate the supplements to social assistance benefits and the following reference tables for supplement amounts and income thresholds by year and type of social assistance:

- Minimum pension: [Table 5](#)
- Social allowance (Pensione Sociale): [Table 6](#)

Chapter 2: Policy enacted 1996-2001

Policy change in 1996

Law 335/1995 ([Gazzetta Ufficiale, 1995](#)), commonly referred to as “*Dini Reform*”, effective from January 1, 1996, changed the structure of the Italian pension system, shifting it from a [DB](#) to an [NDC](#) system. The reform also introduced the following substantial reforms to the social assistance benefit system:

- Introduced a new type of non-contributory pension (social allowance) called “Assegno Sociale.” This new system replaced the existing “Pensione Sociale” social assistance system. The new “Assegno Sociale” social assistance system applies to new applicants for social assistance after January 1, 1996. The old “Pensione Sociale” system still applies to those receiving benefits from it on January 1, 1996, and who continue to satisfy its requirements without interruption.
- Excluded minimum pension benefits provision for those entering the workforce on or after January 1, 1996 (i.e., those for whom only the NDC system applies).

Overview

Old-age, non-contributory social assistance - known as a social allowance (Pensione and/or Assegno Sociale) - is provided monthly to all Italian and EU citizens residing in Italy over the age of 65 who do not receive old-age pension benefits, based on certain income conditions.

Individuals entitled to a small old-age pension benefit under Italy’s [defined benefit plan](#) (i.e., individuals contributing to the pension system prior to 1996) may also have their pension benefit increased by a minimum pension (Trattamento minimo).

In both cases, individuals with very low household income are entitled to a benefit supplement (called *Maggiorazione sociale*), which is granted below certain income thresholds.

Note: See [Figure 1](#) for an overview of the reforms and policy changes in old-age pensions that took place during the time periods included in this document, which affect the provision of social assistance old-age benefits. The figure identifies policy differences by a person’s pension benefit “class”, which is determined by work history at the start of 1996. For each class, the figure summarizes the eligibility tracks available and applicable benefit calculation methods at different points in time.

Eligibility

Age requirements to start benefits without penalty

- **Full eligibility age (FEA)**

Social allowance ([Pensione Sociale](#), [Assegno Sociale](#))

Age 65

Minimum pension (Trattamento Minimo)

Same as [SRA](#) for own old-age pension benefit:

- Age 52 to 65 depending on the [eligibility track](#) and old-age benefit policy in place during a specific year

Minimum pension benefits are conditional to the receipt of old-age pension benefits. See policy document: *Italy, Public Own Old-Age Benefit Plan Details* for further details on eligibility for old-age pension benefits.

Requirements to be eligible to receive benefit

- **Does eligibility depend on the individual’s current income (i.e., income tested)?** Answer: Yes
- **Does eligibility depend on the individual’s current assets (i.e., asset tested)?** Answer: No
- **Details by benefit program:**

Social allowance ([Pensione Sociale](#), [Assegno Sociale](#))

Pensione Sociale is a legacy social allowance system reserved for those receiving this benefit on January 1, 1996 and who continuously satisfy the following requirements to receive the benefit. Assegno Sociale applies to all individuals newly eligible for a social allowance after January 1, 1996, including previous Pensione Sociale recipients where eligibility for the benefit lapsed since January 1, 1996. An individual must satisfy each of the following conditions to be eligible for benefits:

- Residency and citizenship requirement: Reside in Italy and be an Italian citizen, EU citizen, or a non-EU citizen with a residence permit
- Age requirement: At least age 65
- Income requirement: An annual income ¹ below the individual income threshold (equal to the amount of the annual social allowance) and a couple income ¹, if married, below the couple income threshold. For reference values see:
 - * *Pensione Sociale*: [Table 1](#) (Threshold “B” for couples)
 - * *Assegno Sociale*: [Table 8](#)

Minimum pension (Trattamento Minimo)

An individual is eligible for the minimum pension if they are qualified for the [defined benefit \(DB\) system](#) (i.e., [Class 1](#) and [Class 2](#) workers - see definition in policy document: *Italy, Public Own Old-Age Benefit Plan Details*), are already receiving old-age pension benefits and if the following income requirements are met:

- For pensions starting before January 1, 1994:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner ² is less than 2 times the minimum pension level
- For pensions starting during 1994:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner is less than 2 times the minimum pension level
 - * If married, annual income ¹ of the couple is less than 5 times the minimum pension level
- For pensions starting after January 1, 1995:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner is less than 2 times the minimum pension level
 - * If married, annual income ¹ of the couple is less than 4 times the minimum pension level
 - * No minimum pension provisions are available for all [Class 3](#) workers, and for Class 1 and Class 2 workers who have opted to have their pension benefits calculated through the [NDC](#) calculation method

Reference values can be found in the following tables:

- Minimum pension values by year: [Table 2](#)
- Income threshold values for pensions starting before January 1, 1994 and during 1994: [Table 3](#)
- Income threshold values for pensions starting after January 1, 1995: [Table 4](#)

There are no explicit residency, citizenship, or age requirements for the minimum pension beyond those required to qualify for the DB and NDC system.

Supplements to the social allowance “*Pensione Sociale*” ³ and to the minimum pension (Maggiorazione Sociale della Pensione Sociale e del Trattamento Minimo)

In addition to the requirements for social assistance eligibility, an individual must satisfy each of the following conditions to be eligible for supplements to their social assistance benefits (from “*Pensione Sociale*” and “*Trattamento Minimo*”), also known as “increases”:

- Residency and citizenship requirement: None
- Age requirement: At least age 65
- Income requirement: An annual income ¹ below the individual income threshold based on the applicable social assistance system as specified in the following tables:
 - * Minimum pension: [Table 5](#) (Maggiorazione Sociale del Trattamento Minimo)
 - * *Pensione Sociale*: [Table 6](#) (Maggiorazione Sociale della Pensione Sociale)

Notes:

- ¹ See [Box 1](#) for details on income sources used in the computation of income requirements relative to each program’s eligibility. Each means-tested supplemental benefit increase follows the same computation rules of its respective underlying program.
 - ² For pensions starting before January 1, 1994, income requirements account for only individual income, even if the individual is married.
 - ³ During this policy period, no increases are available for the “*Assegno Sociale*” benefits.
- The main difference between Social Allowance provisions and Minimum Pension is that the latter is available only for those eligible for, and receiving, old-age pension benefits, which are raised to the minimum level. Social allowance provisions, instead, are available also for those who have not met the old-age pension eligibility criteria.

Benefits

- To receive a benefit, **does an individual have to claim it?** Answer: Yes
- To continue to receive a benefit, **does an individual have to remain qualified?** Answer: Yes

Factors effecting computation of benefit entitlement

- Does the benefit amount depend on the individual's birth year (regardless of age)? Answer: Yes
- Is the benefit adjusted if an individual delays claiming it? Answer: No
- Are future benefit entitlements adjusted for **cost of living**? Answer: Yes
- If so, what measure is used for adjustment? CPI (country-specific measure, calculated by ISTAT under the name "FOI")

Benefit formula

Social allowance (*Pensione Sociale*)

Benefit payment reflects the amount necessary to bring income up to the *Pensione Sociale* social allowance level depending on the income of the individual and of the couple (if married). See [Formula 1](#) for calculation details. The *Pensione Sociale* allowance level is fixed and adjusted annually. See [Table 7](#) for allowance levels by year.

Social allowance (*Assegno Sociale*)

Benefit payment reflects the amount necessary to bring income up to the *Assegno Sociale* social allowance level depending on the income of the individual and of the couple (if married). See [Formula 6](#) for calculation details. The *Assegno Sociale* allowance level is fixed and adjusted annually. See [Table 9](#) for allowance levels by year.

Minimum pension (*Trattamento minimo*)

The minimum pension supplements an individual's own old-age pension benefit so that it is at least the minimum pension level, which is fixed and adjusted annually. See [Table 2](#) for minimum pension values by year.

The supplemental benefit can be the full or a partial amount of the minimum pension level, depending on the individual's income and when they initially apply for benefits. See the following formulas for how to calculate the social assistance benefits from the minimum pension conditional on own old-age pension entitlements and the date a beneficiary's own old-age pension starts:

- Pensions starting before January 1, 1994: [Formula 2](#)
- Pensions starting in 1994: [Formula 3](#)
- Pensions starting after January 1, 1995: [Formula 4](#)

Note: For pensions starting before January 1, 1994, income requirements consider only individual income, even if the individual is married.

Supplements to the social allowance "*Pensione Sociale*" and to the minimum pension

A person's total social allowance is the sum of their primary social assistance (i.e., social allowance from "*Pensione Sociale*" or minimum pension) and these supplements to social assistance. The maximum amount of the supplements to social allowance or the minimum pension is fixed and intermittently adjusted by the Italian government. The additional benefit can be the full or a partial amount of the supplement, depending on the individual's income. See [Formula 5](#) for how to calculate the supplements to social assistance benefits and the following reference tables for supplement amounts and income thresholds by year and type of social assistance:

- Minimum pension: [Table 5](#)
- Social allowance (*Pensione Sociale*): [Table 6](#)

Note: During this policy period, no increases are available for the *Assegno Sociale* benefits.

Chapter 3: Policy enacted 2002-2022

Policy change in 2002

Law 448/2001 ([Gazzetta Ufficiale, 2001](#)) - effective January 1, 2002 - introduced new supplementary benefits to social assistance systems, with different values and conditions depending on the system:

- Minimum pension (Trattamento Minimo): The law introduced an increase in the previously-existing supplemental benefits (Maggiorazione Sociale) based on age
- Social allowance ([Assegno Sociale](#)): The law introduced supplemental benefits for this system based on age

Additional reforms during this policy period include:

- Art. 20 of Law 133/2008 ([Gazzetta Ufficiale, 2008](#)) - enacted on August 6, 2008 and effective from January 1, 2009 - which:
 - Requires that, to start claiming [Assegno Sociale](#) benefits, a beneficiary must have had legal residence in Italy, on a continuous basis, for at least ten years prior to start claiming.
- Decree-Law 78/2010 - Art. 12 ([Gazzetta Ufficiale, 2010](#)) - enacted on and active from May 31, 2010 - which:
 - Introduced periodic revisions of age eligibility requirements for [Assegno Sociale](#) benefits based on the average life expectancy calculated on [ISTAT](#) data on the 5-year period prior to the adjustment. The first adjustment was set to take place from January 1, 2015 and was limited to a maximum increase of 3 months. Values for the adjustments of these requirements are published within 12 months before the expected adjustment takes place through Ministerial Decrees.
- Decree-Law 201/2011 ([Gazzetta Ufficiale, 2011](#)), known as the “*Fornero Reform*” - enacted on December 6, 2011, and effective from December 7, 2011 - which:
 - Moved the effective year for starting adjustments to age requirements based on increases in life expectancy established from 2015 to 2013.
 - Increased the age requirements to start claiming [Assegno Sociale](#) benefits from 65 years of age to 65 years and 3 months.
 - Established a new increase in age requirements to start claiming [Assegno Sociale](#) benefits, increasing the age requirement of one extra year in addition to the periodic increases based on life expectancy adjustments, active from 2018.
- Ministerial Decree of December 16, 2014 ([Gazzetta Ufficiale, 2014](#)) - active from January 1, 2016 - which, following the provisions on increases in life expectancy as calculated by [ISTAT](#):
 - Increased the age requirements to start claiming [Assegno Sociale](#) benefits from 65 years and 3 months to 65 years and 7 months.
- Ministerial Decree of December 5, 2017 ([Gazzetta Ufficiale, 2017](#)) - active from January 1, 2019 - which, following the provisions on increases in life expectancy as calculated by [ISTAT](#):
 - Increased the age requirements to start claiming [Assegno Sociale](#) benefits from 66 years and 7 months (including the additional one-year increase established in [Decree-Law 201/2011](#)) to 67 years.
- Ministerial Decree of November 5, 2019 ([Gazzetta Ufficiale, 2019](#)) - active from January 1, 2021 - and Ministerial Decree of October 27, 2021 ([Gazzetta Ufficiale, 2021](#)) - active from January 1, 2023 - which:
 - Froze the periodic adjustments in age requirements for [Assegno Sociale](#) benefits, due to the decrease in life expectancy as calculated by [ISTAT](#).

Overview

Old-age, non-contributory social assistance - known as a social allowance (Pensione and/or [Assegno Sociale](#)) - is provided monthly to all Italian and EU citizens residing in Italy over the age of 65 (gradually increasing to 67 years in 2019 for [Assegno Sociale](#)) who do not receive old-age pension benefits, based on certain income conditions.

Individuals entitled to a small old-age pension benefit under Italy’s [defined benefit plan](#) (i.e., individuals contributing to the pension system prior to 1996) may also have their pension benefit increased by a minimum pension (Trattamento minimo).

In both cases, individuals with very low household income are entitled to a benefit supplement (called [Maggiorazione sociale](#)), which is granted below certain income thresholds.

Note: See [Figure 1](#) for an overview of the reforms and policy changes in old-age pensions that took place during the time periods included in this document, which affect the provision of social assistance old-age benefits. The figure identifies policy differences by a person’s pension benefit “class”, which is determined by work history at the start of 1996. For each class, the figure summarizes the eligibility

tracks available and applicable benefit calculation methods at different points in time.

Eligibility

Age requirements to start benefits without penalty

- **Full eligibility age (FEA)**

Social allowance ([Pensione Sociale](#), [Assegno Sociale](#))

Age 65 (gradually increasing to 67 from 2013 until 2019 for Assegno Sociale —See [Table 10](#) for annual increases based on increases in life expectancy)

Minimum pension (Trattamento Minimo)

Same as [SRA](#) for own old-age pension benefit:

- Age 57 to 67 depending on the eligibility track and old-age benefit policy in place during a specific year

Minimum pension benefits are conditional to the receipt of old-age pension benefits. See policy document: *Italy, Public Own Old-Age Benefit Plan Details* for further details on eligibility for old-age pension benefits.

Requirements to be eligible to receive benefit

- **Does eligibility depend on the individual's current income (i.e., income tested)?** Answer: Yes
- **Does eligibility depend on the individual's current assets (i.e., asset tested)?** Answer: No
- **Details by benefit program:**

Social allowance ([Pensione Sociale](#), [Assegno Sociale](#))

Pensione Sociale is a legacy social allowance system reserved for those receiving this benefit on January 1, 1996 and who continuously satisfy the following requirements to receive the benefit. Assegno Sociale applies to all individuals newly eligible for a social allowance after January 1, 1996, including previous Pensione Sociale recipients where eligibility for the benefit lapsed since January 1, 1996. An individual must satisfy each of the following conditions to be eligible for benefits:

- Residency and citizenship requirement: Reside in Italy and be an Italian citizen, EU citizen, or a non-EU citizen with a residence permit. Residency requirements are met when an individual has established legal residency in Italy for a least ten years prior to claiming benefits on a continuous basis.
- Age requirement: At least age 65 (gradually increasing to 67 from 2013 until 2019 for Assegno Sociale —See [Table 10](#) for annual increases based on increases in life expectancy)
- Income requirement: An annual income ¹ below the individual income threshold (equal to the amount of the annual social allowance) and a couple income ¹, if married, below the couple income threshold. For reference values see:
 - * Pensione Sociale: [Table 1](#) (Threshold “B” for couples)
 - * Assegno Sociale: [Table 8](#)

Minimum pension (Trattamento Minimo)

An individual is eligible for the minimum pension if they are qualified for the [defined benefit \(DB\) system](#) (i.e., [Class 1](#) and [Class 2](#) workers - see definition in policy document: *Italy, Public Own Old-Age Benefit Plan Details*), are already receiving old-age pension benefits and if the following income requirements are met:

- For pensions starting before January 1, 1994:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner ² is less than 2 times the minimum pension level
- For pensions starting during 1994:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner is less than 2 times the minimum pension level
 - * If married, annual income ¹ of the couple is less than 5 times the minimum pension level
- For pensions starting after January 1, 1995:
 - * The monthly old-age pension benefit is below the monthly minimum pension stated in [Table 2](#)
 - * Annual income ¹ of the pensioner is less than 2 times the minimum pension level
 - * If married, annual income ¹ of the couple is less than 4 times the minimum pension level
 - * No minimum pension provisions are available for all [Class 3](#) workers, and for Class 1 and Class 2 workers who have opted to have their pension benefits calculated through the [NDC](#) calculation method

Reference values can be found in the following tables:

- Minimum pension values by year: [Table 2](#)

- Income threshold values for pensions starting before January 1, 1994 and during 1994: [Table 3](#)
- Income threshold values for pensions starting after January 1, 1995: [Table 4](#)

There are no explicit residency, citizenship, or age requirements for the minimum pension beyond those required to qualify for the DB and NDC system.

Supplements to the social allowance “*Pensione Sociale*”³ and to the minimum pension (*Maggiorazione Sociale della Pensione Sociale e del Trattamento Minimo*)

In addition to the requirements for social assistance eligibility, an individual must satisfy each of the following conditions to be eligible for supplements to their social assistance benefits (from “*Pensione Sociale*” and “*Trattamento Minimo*”), also known as “increases”:

- Residency and citizenship requirement: None
- Age requirement: At least age 65 (gradually increasing to 67 from 2013 until 2019 for *Assegno Sociale* —See [Table 10](#) for annual increases based on increases in life expectancy)
- Income requirement: An annual income¹ below the individual income threshold based on the applicable social assistance system as specified in the following tables:
 - * Minimum pension: [Table 5](#) (*Maggiorazione Sociale del Trattamento Minimo*)
 - * *Pensione Sociale*: [Table 6](#) (*Maggiorazione Sociale della Pensione Sociale*)

Extra supplements to social assistance benefits from “*Assegno Sociale*”⁴ (*Maggiorazione Sociale dell’Assegno Sociale*) (*Extra Maggiorazione Sociale della Pensione Sociale e del Trattamento Minimo*)

In addition to the requirements for social assistance eligibility, an individual must satisfy each of the following conditions to be eligible for the extra supplements to their social assistance benefits deriving from “*Assegno Sociale*” or minimum pension:

- Residency and citizenship requirement: None
- Age requirement: At least age 70, but the qualifying age can be lowered by one year for each period of 5 years of paid contributions but no lower than age 65 (gradually increasing to 67 from 2013 until 2019 for *Assegno Sociale* —See [Table 10](#) for annual increases based on increases in life expectancy) —See [Formula 7](#) for how to determine eligibility age based contribution years to the public pension
- Income requirement: An annual income¹ below the individual income threshold based on the applicable social assistance system as specified in the following tables:
 - * Minimum pension: [Table 11](#) (*Trattamento Minimo’s extra increase of the Maggiorazione Sociale*)
 - * *Assegno Sociale*: [Table 12](#) (*Assegno Sociale’s increase of the Maggiorazione Sociale*)

Notes:

- ¹ See [Box 1](#) for details on income sources used in the computation of income requirements relative to each program’s eligibility. Each means-tested supplemental benefit increase follows the same computation rules of its respective underlying program.
 - ² For pensions starting before January 1, 1994, income requirements account for only individual income, even if the individual is married.
 - ³ No increases are available for the “*Assegno Sociale*” benefits under this provision.
 - ⁴ No increases are available for the “*Pensione Sociale*” benefits under this provision.
- The main difference between Social Allowance provisions and Minimum Pension is that the latter is available only for those eligible for, and receiving, old-age pension benefits, which are raised to the minimum level. Social allowance provisions, instead, are available also for those who have not met the old-age pension eligibility criteria.

Benefits

- To receive a benefit, **does an individual have to claim it?** Answer: Yes
- To continue to receive a benefit, **does an individual have to remain qualified?** Answer: Yes

Factors effecting computation of benefit entitlement

- Does the benefit amount depend on the individual’s birth year (regardless of age)? Answer: Yes
- Is the benefit adjusted if an individual delays claiming it? Answer: No
- Are future benefit entitlements adjusted for **cost of living**? Answer: Yes
- If so, what measure is used for adjustment? CPI (country-specific measure, calculated by ISTAT under the name “FOI”)

Benefit formula

Social allowance ([Pensione Sociale](#))

Benefit payment reflects the amount necessary to bring income up to the *Pensione Sociale* social allowance level depending on the income of the individual and of the couple (if married). See [Formula 1](#) for calculation details. The *Pensione Sociale* allowance level is fixed and adjusted annually. See [Table 7](#) for allowance levels by year.

Social allowance (*Assegno Sociale*)

Benefit payment reflects the amount necessary to bring income up to the *Assegno Sociale* social allowance level depending on the income of the individual and of the couple (if married). See [Formula 6](#) for calculation details. The *Assegno Sociale* allowance level is fixed and adjusted annually. See [Table 9](#) for allowance levels by year.

Minimum pension (*Trattamento minimo*)

The minimum pension supplements an individual's own old-age pension benefit so that it is at least the minimum pension level, which is fixed and adjusted annually. See [Table 2](#) for minimum pension values by year.

The supplemental benefit can be the full or a partial amount of the minimum pension level, depending on the individual's income and when they initially apply for benefits. See the following formulas for how to calculate the social assistance benefits from the minimum pension conditional on own old-age pension entitlements and the date a beneficiary's own old-age pension starts:

- Pensions starting before January 1, 1994: [Formula 2](#)
- Pensions starting in 1994: [Formula 3](#)
- Pensions starting after January 1, 1995: [Formula 4](#)

Note: For pensions starting before January 1, 1994, income requirements consider only individual income, even if the individual is married.

Supplements to the social allowance "*Pensione Sociale*" and to the minimum pension

A person's total social allowance is the sum of their primary social assistance (i.e., social allowance from "*Pensione Sociale*" or minimum pension) and these supplements to social assistance. The maximum amount of the supplements to social allowance or the minimum pension is fixed and intermittently adjusted by the Italian government. The additional benefit can be the full or a partial amount of the supplement, depending on the individual's income. See [Formula 5](#) for how to calculate the supplements to social assistance benefits and the following reference tables for supplement amounts and income thresholds by year and type of social assistance:

- Minimum pension: [Table 5](#)
- Social allowance (*Pensione Sociale*): [Table 6](#)

Note: Benefits from *Assegno Sociale* are not subject to this increase.

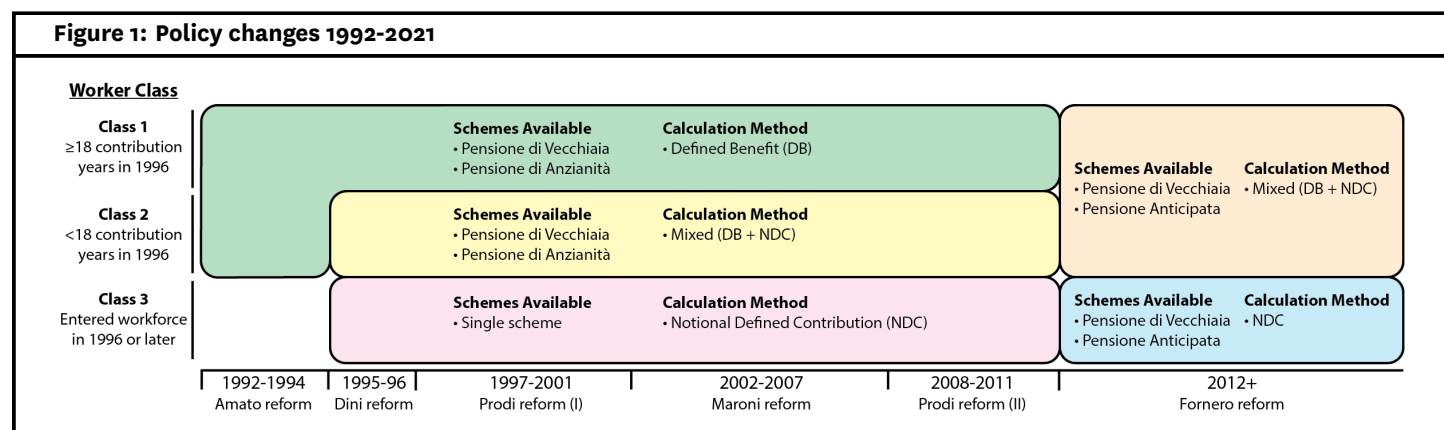
Extra supplements to social assistance benefits from "*Assegno Sociale*" or minimum pension (Extra *Maggiorazione Sociale*)

A person's total social allowance is the sum of their primary social assistance (i.e., social allowance from "*Assegno Sociale*" or minimum pension), supplements to the social assistance, and these extra supplements to social assistance. The maximum amount of the extra supplements to social allowance or the minimum pension is fixed and intermittently adjusted by the Italian government. The additional benefit can be the full or a partial amount of the extra supplement, depending on the individual's income. See [Formula 5](#) for how to calculate the supplements and extra supplements to social assistance benefits and the following reference tables for extra supplement amounts and income thresholds by year and type of social assistance:

- Minimum pension: [Table 11](#)
- Social allowance (*Assegno Sociale*): [Table 12](#)

Note: Benefits from *Pensione Sociale* are not subject to this increase.

Tables and Formulas



Source: Authors' interpretation of historical policy changes.

Note: The horizontal axis represents the time period included in this document divided into key reform periods. The vertical axis represents the different pension benefit "classes" that are defined by work history in 1996.

Table 1: Social Allowance (Pensione Sociale) - Annual Income Thresholds

| Year | Individual Income Threshold | Couple Income Threshold A | Couple Income Threshold B |
|------|-----------------------------|---------------------------|---------------------------|
| 1992 | Unknown ¹ | Unknown ¹ | Unknown ¹ |
| 1993 | Unknown ¹ | Unknown ¹ | Unknown ¹ |
| 1994 | Unknown ¹ | Unknown ¹ | Unknown ¹ |
| 1995 | 2,396.88 € | 7,568.57 € | 9,965.45 € |
| 1996 | 2,526.46 | 7,977.27 | 10,503.73 |
| 1997 | 2,625.15 | 8,288.38 | 10,913.53 |
| 1998 | 2,669.80 | 8,429.27 | 11,099.07 |
| 1999 | 3,389.20 | 8,581.01 | 11,970.20 |
| 2000 | 3,564.43 | 8,709.74 | 12,270.47 |
| 2001 | 3,657.08 | 8,944.98 | 12,602.06 |
| 2002 | 3,755.83 | 9,186.50 | 12,942.33 |
| 2003 | 3,846.05 | 9,406.98 | 13,253.03 |
| 2004 | 3,942.25 | 9,642.16 | 13,584.41 |
| 2005 | 4,021.16 | 9,835.01 | 13,856.17 |
| 2006 | 4,089.54 | 10,002.21 | 14,091.72 |
| 2007 | 4,171.44 | 10,202.26 | 14,373.70 |
| 2008 | 4,242.42 | 10,375.70 | 14,618.12 |
| 2009 | 4,378.27 | 10,707.73 | 15,086.00 |
| 2010 | 4,408.95 | 10,782.69 | 15,191.64 |
| 2011 | 4,479.54 | 10,955.22 | 15,434.76 |
| 2012 | 4,600.57 | 11,251.02 | 15,851.59 |
| 2013 | 4,738.63 | 11,588.56 | 16,327.19 |
| 2014 | 4,790.76 | 11,716.04 | 16,506.80 |
| 2015 | 4,800.38 | 11,739.48 | 16,539.86 |
| 2016 | 4,800.38 | 11,739.48 | 16,539.86 |
| 2017 | 4,800.38 | 11,739.48 | 16,539.86 |
| 2018 | 4,853.29 | 11,868.62 | 16,721.91 |
| 2019 | 4,906.72 | 11,999.18 | 16,905.90 |
| 2020 | 4,931.29 | 12,059.18 | 16,990.47 |
| 2021 | 4,931.29 | 12,059.18 | 16,990.47 |
| 2022 | 5,010.20 ² | 12,252.13 ² | 17,262.33 ² |

Notes:¹ Values not yet identified² Provisional values

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 2: Minimum Pension (Trattamento Minimo) - Maximum Benefit Levels

| Year | Monthly | Yearly |
|------|---------------------|-----------------------|
| 1992 | 290.82 € | 3,780.62 € |
| 1993 | 298.38 | 3,878.98 |
| 1994 | 311.09 | 4,044.14 |
| 1995 | 323.53 | 4,205.95 |
| 1996 | 341.02 | 4,433.21 |
| 1997 | 354.32 | 4,606.10 |
| 1998 | 360.33 | 4,684.32 |
| 1999 | 366.81 | 4,768.58 |
| 2000 | 372.31 | 4,840.08 |
| 2001 | 382.36 | 4,970.67 |
| 2002 | 392.69 | 5,104.97 |
| 2003 | 402.12 | 5,227.56 |
| 2004 | 412.18 | 5,358.34 |
| 2005 | 420.43 | 5,465.59 |
| 2006 | 427.58 | 5,558.54 |
| 2007 | 436.14 | 5,669.82 |
| 2008 | 443.56 | 5,766.28 |
| 2009 | 457.76 | 5,950.88 |
| 2010 | 460.97 | 5,992.61 |
| 2011 | 468.35 | 6,088.55 |
| 2012 | 481.00 | 6,253.00 |
| 2013 | 495.43 | 6,440.59 |
| 2014 | 500.88 | 6,511.44 |
| 2015 | 501.89 | 6,524.57 |
| 2016 | 501.89 | 6,524.57 |
| 2017 | 501.89 | 6,524.57 |
| 2018 | 507.42 | 6,596.46 |
| 2019 | 513.01 | 6,669.13 |
| 2020 | 515.58 | 6,702.54 |
| 2021 | 515.58 | 6,702.54 |
| 2022 | 523.83 ¹ | 6,809.79 ¹ |

Notes:

¹ Provisional values

- Yearly pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 3: Minimum Pension - Annual Income Thresholds (for Pensions Starting Before January 1, 1994 and During 1994)

| Year | Individual (Threshold Pension) | income A = Min. | Individual (Threshold Pension) | income B = 2 × Min. | Couple (Threshold Min. Pension) | income A = 4 × | Couple (Threshold Min. Pension) | income B = 5 × |
|------|--------------------------------------|--------------------|--------------------------------------|------------------------|---------------------------------------|-------------------|---------------------------------------|-------------------|
| 1992 | 3,780.62 € | | 7,561.24 € | | 15,122.48 € | | 18,903.10 € | |
| 1993 | 3,878.98 | | 7,757.96 | | 15,515.92 | | 19,394.90 | |
| 1994 | 4,044.14 | | 8,088.28 | | 16,176.56 | | 20,220.70 | |
| 1995 | 4,205.95 | | 8,411.90 | | 16,823.80 | | 21,029.75 | |
| 1996 | 4,433.21 | | 8,866.42 | | 17,732.84 | | 22,166.05 | |
| 1997 | 4,606.10 | | 9,212.20 | | 18,424.40 | | 23,030.50 | |
| 1998 | 4,684.32 | | 9,368.64 | | 18,737.28 | | 23,421.60 | |
| 1999 | 4,768.58 | | 9,537.16 | | 19,074.32 | | 23,842.90 | |
| 2000 | 4,840.08 | | 9,680.16 | | 19,360.32 | | 24,200.40 | |
| 2001 | 4,970.67 | | 9,941.34 | | 19,882.68 | | 24,853.35 | |
| 2002 | 5,104.97 | | 10,209.94 | | 20,419.88 | | 25,524.85 | |
| 2003 | 5,227.56 | | 10,455.12 | | 20,910.24 | | 26,137.80 | |
| 2004 | 5,358.34 | | 10,716.68 | | 21,433.36 | | 26,791.70 | |
| 2005 | 5,465.59 | | 10,931.18 | | 21,862.36 | | 27,327.95 | |
| 2006 | 5,558.54 | | 11,117.08 | | 22,234.16 | | 27,792.70 | |
| 2007 | 5,669.82 | | 11,339.64 | | 22,679.28 | | 28,349.10 | |
| 2008 | 5,766.28 | | 11,532.56 | | 23,065.12 | | 28,831.40 | |
| 2009 | 5,950.88 | | 11,901.76 | | 23,803.52 | | 29,754.40 | |
| 2010 | 5,992.61 | | 11,985.22 | | 23,970.44 | | 29,963.05 | |
| 2011 | 6,088.55 | | 12,177.10 | | 24,354.20 | | 30,442.75 | |
| 2012 | 6,253.00 | | 12,506.00 | | 25,012.00 | | 31,265.00 | |
| 2013 | 6,440.59 | | 12,881.18 | | 25,762.36 | | 32,202.95 | |
| 2014 | 6,511.44 | | 13,022.88 | | 26,045.76 | | 32,557.20 | |
| 2015 | 6,524.57 | | 13,049.14 | | 26,098.28 | | 32,622.85 | |
| 2016 | 6,524.57 | | 13,049.14 | | 26,098.28 | | 32,622.85 | |
| 2017 | 6,524.57 | | 13,049.14 | | 26,098.28 | | 32,622.85 | |
| 2018 | 6,596.46 | | 13,192.92 | | 26,385.84 | | 32,982.30 | |
| 2019 | 6,669.13 | | 13,338.26 | | 26,676.52 | | 33,345.65 | |
| 2020 | 6,702.54 | | 13,405.08 | | 26,810.16 | | 33,512.70 | |
| 2021 | 6,702.54 | | 13,405.08 | | 26,810.16 | | 33,512.70 | |
| 2022 | 6,089.79 ¹ | | 13,619.58 ¹ | | 27,239.16 ¹ | | 34,048.95 ¹ | |

Note:¹ Provisional values

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 4: Minimum Pension - Annual Income Thresholds (for Pensions Starting After January 1, 1995)

| Year | Individual (Threshold A = Min. Pension) | income = Min. | Individual (Threshold B = 2 × Min. Pension) | income = 2 × Min. | Couple (Threshold A = 3 × Min. Pension) | income = 3 × Min. | Couple (Threshold B = 4 × Min. Pension) | income = 4 × Min. |
|------|--|------------------|--|----------------------|--|----------------------|--|----------------------|
| 1995 | 4,205.95 € | | 8,411.90 € | | 12,617.85 € | | 16,823.80 € | |
| 1996 | 4,433.21 | | 8,866.42 | | 13,299.63 | | 17,732.84 | |
| 1997 | 4,606.10 | | 9,212.20 | | 13,818.30 | | 18,424.40 | |
| 1998 | 4,684.32 | | 9,368.64 | | 14,052.96 | | 18,737.28 | |
| 1999 | 4,768.58 | | 9,537.16 | | 14,305.74 | | 19,074.32 | |
| 2000 | 4,840.08 | | 9,680.16 | | 14,520.24 | | 19,360.32 | |
| 2001 | 4,970.67 | | 9,941.34 | | 14,912.01 | | 19,882.68 | |
| 2002 | 5,104.97 | | 10,209.94 | | 15,314.91 | | 20,419.88 | |
| 2003 | 5,227.56 | | 10,455.12 | | 15,682.68 | | 20,910.24 | |
| 2004 | 5,358.34 | | 10,716.68 | | 16,075.02 | | 21,433.36 | |
| 2005 | 5,465.59 | | 10,931.18 | | 16,396.77 | | 21,862.36 | |
| 2006 | 5,558.54 | | 11,117.08 | | 16,675.62 | | 22,234.16 | |
| 2007 | 5,669.82 | | 11,339.64 | | 17,009.46 | | 22,679.28 | |
| 2008 | 5,766.28 | | 11,532.56 | | 17,298.84 | | 23,065.12 | |
| 2009 | 5,950.88 | | 11,901.76 | | 17,852.64 | | 23,803.52 | |
| 2010 | 5,992.61 | | 11,985.22 | | 17,977.83 | | 23,970.44 | |
| 2011 | 6,088.55 | | 12,177.10 | | 18,265.65 | | 24,354.20 | |
| 2012 | 6,253.00 | | 12,506.00 | | 18,759.00 | | 25,012.00 | |
| 2013 | 6,440.59 | | 12,881.18 | | 19,321.77 | | 25,762.36 | |
| 2014 | 6,511.44 | | 13,022.88 | | 19,534.32 | | 26,045.76 | |
| 2015 | 6,524.57 | | 13,049.14 | | 19,573.71 | | 26,098.28 | |
| 2016 | 6,524.57 | | 13,049.14 | | 19,573.71 | | 26,098.28 | |
| 2017 | 6,524.57 | | 13,049.14 | | 19,573.71 | | 26,098.28 | |
| 2018 | 6,596.46 | | 13,192.92 | | 19,789.38 | | 26,385.84 | |
| 2019 | 6,669.13 | | 13,338.26 | | 20,007.39 | | 26,676.52 | |
| 2020 | 6,702.54 | | 13,405.08 | | 20,107.62 | | 26,810.16 | |
| 2021 | 6,702.54 | | 13,405.08 | | 20,107.62 | | 26,810.16 | |
| 2022 | 6,089.79 ¹ | | 13,619.58 ¹ | | 20,429.37 ¹ | | 27,239.16 ¹ | |

Note:¹ Provisional values

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 5: Maggiorazione Sociale of the Minimum Pension (65 years and older) - Values and Annual Income Thresholds

| Year | Monthly increase | Yearly increase | Individual threshold | income | Couple threshold | income |
|-----------|------------------|-----------------|-------------------------|--------|------------------------|--------|
| 1988-1997 | 41.32 € | 537.12 € | Unknown ¹ | | Unknown ¹ | |
| 1998 | 41.32 | 537.12 | 5,221.43 € | | 8,626.74 € | |
| 1999 | 41.32 | 537.12 | 5,305.69 | | 9,443.83 | |
| 2000 | 41.32 | 537.12 | 5,381.89 | | 9,707.01 | |
| 2001 | 82.64 | 1,074.32 | 6,044.99 | | 10,482.57 | |
| 2002 | 82.64 | 1,074.32 | 6,179.29 | | 10,736.70 | |
| 2003 | 82.64 | 1,074.32 | 6,301.88 | | 10,968.75 | |
| 2004 | 82.64 | 1,074.32 | 6,432.66 | | 11,216.27 | |
| 2005 | 82.64 | 1,074.32 | 6,539.91 | | 11,419.20 | |
| 2006 | 82.64 | 1,074.32 | 6,632.86 | | 11,595.22 | |
| 2007 | 82.64 | 1,074.32 | 6,744.14 | | 11,805.82 | |
| 2008 | 82.64 | 1,074.32 | 6,840.60 | | 11,988.34 | |
| 2009 | 82.64 | 1,074.32 | 7,025.20 | | 12,337.78 | |
| 2010 | 82.64 | 1,074.32 | 7,066.93 | | 12,416.82 | |
| 2011 | 82.64 | 1,074.32 | 7,162.87 | | 12,598.43 | |
| 2012 | 82.64 | 1,074.32 | 7,327.32 | | 12,909.65 | |
| 2013 | 82.64 | 1,074.32 | 7,513.91 | | 13,264.81 | |
| 2014 | 82.64 | 1,074.32 | 7,585.76 | | 13,398.97 | |
| 2015 | 82.64 | 1,074.32 | 7,598.89 | | 13,423.80 | |
| 2016 | 82.64 | 1,074.32 | 7,598.89 | | 13,423.80 | |
| 2017 | 82.64 | 1,074.32 | 7,598.89 | | 13,423.80 | |
| 2018 | 82.64 | 1,074.32 | 7,670.78 | | 13,559.78 | |
| 2019 | 82.64 | 1,074.32 | 7,743.45 | | 13,697.32 | |
| 2020 | 82.64 | 1,074.32 | 7,776.86 | | 13,760.50 | |
| 2021 | 82.64 | 1,074.32 | 7,776.86 | | 13,760.50 | |
| 2022 | 82.64 | 1,074.32 | 7,884.11 ² | | 13,963.56 ² | |

Notes:¹ Values not yet identified² Provisional values

• Yearly social assistance pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 6: Maggiorazione Sociale of the Pensione Sociale - Values and Annual Income Thresholds

| Year | Monthly increase | Annual increase | Individual income threshold | Couple income threshold |
|------|---------------------|-----------------------|-----------------------------|-------------------------|
| 1992 | 64.56 € | 839.24 € | Unknown ¹ | Unknown ¹ |
| 1993 | 64.57 | 839.24 | 3,049.47 € | 6,928.45 € |
| 1994 | 64.58 | 839.24 | 3,143.80 | 7,187.94 |
| 1995 | 64.59 | 839.24 | 3,236.12 | 7,442.07 |
| 1996 | 64.60 | 839.24 | 3,365.39 | 6,588.08 |
| 1997 | 64.61 | 839.24 | 3,464.39 | 6,812.63 |
| 1998 | 64.62 | 839.24 | 3,509.04 | 6,914.35 |
| 1999 | 64.63 | 839.24 | 4,228.44 | 8,366.58 |
| 2000 | 64.64 | 839.24 | 4,399.98 | 8,721.07 |
| 2001 | 85.22 | 1,107.8 | 4,764.88 | 9,202.46 |
| 2002 | 277.55 | 3,608.15 | 7,363.98 | 11,921.39 |
| 2003 | 230.04 | 2,990.52 | 6,836.57 | 11,503.44 |
| 2004 | 232.70 | 3,025.1 | 6,967.35 | 11,750.96 |
| 2005 | 234.88 | 3,053.44 | 7,074.60 | 11,953.89 |
| 2006 | 236.77 | 3,078.01 | 7,167.55 | 12,129.91 |
| 2007 | 239.03 | 3,107.39 | 7,278.83 | 12,340.51 |
| 2008 | 253.66 | 3,297.58 | 7,540.00 | 12,687.74 |
| 2009 | 257.41 | 3,346.33 | 7,724.60 | 13,037.18 |
| 2010 | 258.26 | 3,357.38 | 7,766.33 | 13,116.22 |
| 2011 | 260.21 | 3,382.73 | 7,862.27 | 13,297.83 |
| 2012 | 263.55 | 3,426.15 | 8,026.72 | 13,609.05 |
| 2013 | 267.36 | 3,475.68 | 8,214.31 | 13,964.21 |
| 2014 | 268.8 | 3,494.4 | 8,285.16 | 14,098.37 |
| 2015 | 269.07 | 3,497.91 | 8,298.29 | 14,123.20 |
| 2016 | 269.07 | 3,497.91 | 8,298.29 | 14,123.20 |
| 2017 | 269.07 | 3,497.91 | 8,298.29 | 14,123.20 |
| 2018 | 270.53 | 3,516.89 | 8,370.18 | 14,259.18 |
| 2019 | 272.56 | 3,543.28 | 8,442.85 | 14,396.72 |
| 2020 | 272.69 | 3,544.97 | 8,476.26 | 14,459.90 |
| 2021 | 272.69 | 3,544.97 | 8,476.26 | 14,459.90 |
| 2022 | 274.87 ² | 3,573.31 ² | 8,583.51 ² | 14,662.96 ² |

Notes:¹ Values not yet identified² Provisional values

- Yearly social assistance pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Box 1: Sources of Income Subject to Means-Test in Social Assistance Programs

Pensione Sociale

The following sources of income are included in the computation:

- All pre-tax (gross) income subject to Personal Income Tax (*IRPEF*)
- Old-age pension benefits and other social security or welfare benefits of a continuous nature
- Social allowances of which the spouse is a beneficiary (for couple income thresholds)

The following sources of income are excluded from the computation:

- Arrears subject to separate taxation
- Other income not subject to Personal Income Tax (*IRPEF*) and/or subject to different taxation regimes (such as bond interests and/or capital gains)

Assegno Sociale

The following sources of income are included in the computation:

- All post-tax and post-social contributions (net) income subject to Personal Income Tax (*IRPEF*)
- Other income not subject to Personal Income Tax (*IRPEF*) and/or pre-tax (gross) income subject to different taxation regimes (such as bond interests and/or capital gains)
- Old-age pension benefits and other social security or welfare benefits of a continuous nature
- Social allowances of which the spouse is a beneficiary (for couple income thresholds)
- Rent income from land and real estate

The following sources of income are excluded from the computation:

- Arrears subject to separate taxation

Minimum Pension

The following sources of income are included in the computation:

- All pre-tax (gross) income subject to Personal Income Tax (*IRPEF*)
- Social security or welfare benefits of a continuous nature, excluding old-age pension benefits

The following sources of income are excluded from the computation:

- Arrears subject to separate taxation
- Old-age pension benefits to be integrated to the minimum levels
- Other income not subject to Personal Income Tax (*IRPEF*) and/or subject to different taxation regimes (such as bond interests and/or capital gains)

Sources: Pensione Sociale: [Law 153/1969](#); Assegno Sociale: [Law no. 335/1995](#); Minimum Pension: [Law 463/1983](#).

Formula 1: Benefit Formula for Social Allowance (Pensione Sociale) Benefits

$$B_{SA(PS),i,t} = \begin{cases} \frac{PS_t - \text{Income}_{i,t}}{13} & \text{if } \text{Income}_{i,t} < PS_t \text{ (and, for married couple, if } \text{Income}_{c,t} < IT_t^A) \\ \min\left(\frac{PS_t - \text{Income}_{i,t}}{13}, \frac{\text{Income}_{c,t} - IT_t^A}{13}\right) & \text{if married and } \text{Income}_{i,t} < PS_t \text{ \& } \text{Income}_{c,t} \in [IT_t^A, IT_t^B] \\ 0 & \text{if either married or unmarried and } \text{Income}_{i,t} \geq PS_t \\ 0 & \text{if married and } \text{Income}_{i,t} < PS_t \text{ and if } \text{Income}_{c,t} > IT_t^B \end{cases}$$

- $B_{SA(PS),i,t}$ = Individual i 's monthly social assistance benefits due to Pensione Sociale at time t
- PS_t = Annual Pensione Sociale at time t —See [Table 7](#) for reference values
- IT_t^A = Couple income threshold “A” at time t —See [Table 1](#) for reference values
- IT_t^B = Couple income threshold “B” at time t —See [Table 1](#) for reference values
- $\text{Income}_{i,t}$ = Individual i 's annual income at time t
- $\text{Income}_{c,t}$ = Couple c 's annual income at time t

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Table 7: Social Allowance (Pensione Sociale) - Maximum Benefit Levels

| Year | Monthly | Yearly |
|------|----------------------|-----------------------|
| 1992 | Unknown ¹ | Unknown ¹ |
| 1993 | 170.02 € | 2,210.23 € |
| 1994 | 177.27 | 2,304.56 |
| 1995 | 184.38 | 2,396.88 |
| 1996 | 194.34 | 2,526.15 |
| 1997 | 201.93 | 2,625.15 |
| 1998 | 205.37 | 2,669.80 |
| 1999 | 260.71 | 3,389.20 |
| 2000 | 273.90 | 3,560.74 |
| 2001 | 281.31 | 3,657.08 |
| 2002 | 288.91 | 3,755.83 |
| 2003 | 295.85 | 3,846.05 |
| 2004 | 303.25 | 3,942.25 |
| 2005 | 309.32 | 4,021.16 |
| 2006 | 314.58 | 4,089.54 |
| 2007 | 320.88 | 4,171.44 |
| 2008 | 326.34 | 4,242.42 |
| 2009 | 336.79 | 4,378.27 |
| 2010 | 339.15 | 4,408.95 |
| 2011 | 344.58 | 4,479.54 |
| 2012 | 353.89 | 4,600.57 |
| 2013 | 364.51 | 4,738.63 |
| 2014 | 368.52 | 4,790.76 |
| 2015 | 369.26 | 4,800.38 |
| 2016 | 369.26 | 4,800.38 |
| 2017 | 369.26 | 4,800.38 |
| 2018 | 373.33 | 4,853.29 |
| 2019 | 377.44 | 4,906.72 |
| 2020 | 379.33 | 4,931.29 |
| 2021 | 379.33 | 4,931.29 |
| 2022 | 385.40 ² | 5,010.20 ² |

Notes:

¹ Values not yet identified

² Provisional values

- Yearly social assistance pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Formula 2: Formula for Supplemental Benefits Paid Due to Minimum Pension Qualification (Pension Starting Before 1994)

$$B_{SA(MP),i,t} = \begin{cases} \frac{MINP_t}{13} & \text{if } Income_{i,t} < MINP_t \\ \frac{2 \times MINP_t - Income_{i,t}}{13} & \text{if } Income_{i,t} \in [MINP_t, 2 \times MINP_t] \\ 0 & \text{otherwise} \end{cases}$$

- $B_{SA(MP),i,t}$ = Individual i 's monthly social assistance benefits due to the minimum pension at time t
- $MINP_t$ = Annual minimum pension level at time t —See [Table 2](#) for values by year
- $Income_{i,t}$ = Individual i 's annual taxable income at time t , including old-age pension benefits

Note: For minimum pension benefits starting before January 1, 1994, the income at the couple-level does not influence the determination of the minimum pension benefits

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Formula 3: Formula for Supplemental Benefits Paid Due to Minimum Pension Qualification (Pension Starting During 1994)

$$B_{SA(MP),i,t} = \begin{cases} \frac{MINP_t}{13} & \text{if not married and } Income_{i,t} < MINP_t \\ \frac{2 \times MINP_t - Income_{i,t}}{13} & \text{if not married and } Income_{i,t} \in [MINP_t, 2 \times MINP_t] \\ \frac{MINP_t}{13} & \text{if married and } Income_{i,t} < 2 \times MINP_t \\ & \text{and } Income_{c,t} < 4 \times MINP_t \\ \min \left\{ \frac{2 \times MINP_t - I_i}{13}, \frac{5 \times MINP_t - I_c}{13} \right\} & \text{if married and } Income_{i,t} < 2 \times MINP_t \\ & \text{and } Income_{c,t} \in [4 \times MINP_t, 5 \times MINP_t] \\ 0 & \text{otherwise} \end{cases}$$

- $B_{SA(MP),i,t}$ = Individual i 's monthly social assistance benefits due to the minimum pension at time t
- $MINP_t$ = Annual minimum pension level at time t —See [Table 2](#) for values by year
- $Income_{i,t}$ = Individual i 's annual taxable income at time t , including old-age pension benefits
- $Income_{c,t}$ = Couple c 's annual taxable income at time t , including old-age pension benefits

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Formula 4: Formula for Supplemental Benefits Paid Due to Minimum Pension Qualification (Pension Starting After 1994)

$$B_{SA(MP),i,t} = \begin{cases} \frac{MINP_t}{13} & \text{if not married and } Income_{i,t} < MINP_t \\ \frac{2 \times MINP_t - Income_{i,t}}{13} & \text{if not married and } Income_{i,t} \in [MINP_t, 2 \times MINP_t] \\ \frac{MINP_t}{13} & \text{if married and } Income_{i,t} < 2 \times MINP_t \\ & \text{and } Income_{c,t} < 3 \times MINP_t \\ \min \left\{ \frac{2 \times MINP_t - Income_{i,t}}{13}, \frac{4 \times MINP_t - Income_{c,t}}{13} \right\} & \text{if married and } Income_{i,t} < 2 \times MINP_t \\ & \text{and } Income_{c,t} \in [3 \times MINP_t, 4 \times MINP_t] \\ 0 & \text{otherwise} \end{cases}$$

- $B_{SA(MP),i,t}$ = Individual i 's monthly social assistance benefits due to the minimum pension at time t
- $MINP_t$ = Annual minimum pension level at time t —See [Table 2](#) for values by year
- $Income_{i,t}$ = Individual i 's annual taxable income at time t , including old-age pension benefits
- $Income_{c,t}$ = Couple c 's annual taxable income at time t , including old-age pension benefits

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Formula 5: Consolidated Formula for Social Assistance Supplements

$$B_{SA(MS),i,t} = \begin{cases} \frac{TR_{i,t} - (\text{Income}_{i,t} + B_{SA,i,t})}{13} & \text{if not married and } \text{Income}_{i,t} \geq TR_{i,t} \\ \min\left\{\frac{TR_{i,t} - (\text{Income}_{i,t} + B_{SA,i,t})}{13}, \frac{TR_{c,t} - (\text{Income}_{c,t} + B_{SA,i,t})}{13}\right\} & \text{if married and } \text{Income}_{i,t} < TR_{i,t} \\ & \text{and } \text{Income}_{c,t} < TR_{c,t} \\ 0 & \text{otherwise} \end{cases}$$

- $B_{SA(MS),i,t}$ = Individual i 's monthly additional social assistance benefits from Maggiorazione Sociale at time t
- $B_{SA,i,t}$ = Individual i 's monthly social assistance benefits at time t from one of the social assistance systems:
 - $B_{SA(MP)}$ for the minimum pension, as described in [Formula 2](#), [Formula 3](#) and [Formula 4](#) depending on when these benefits begin
 - $B_{SA(PS),i,t}$ for Pensione Sociale, as described in [Formula 1](#)
 - $B_{SA(AS),i,t}$ for Assegno Sociale, as described in [Formula 6](#)
- $TR_{i,t}$ = Combined annual individual income threshold = $\text{MAX}_t^{SA(i)} + \text{MAX}_t^{MS(i)}$

$\text{MAX}_t^{SA(i)}$ = The maximum annual benefit of the applicable social assistance system for an individual in year t —These values can be found at the following tables:

- Minimum pension: [Table 2](#)
- Pensione Sociale: [Table 7](#)
- Assegno Sociale: [Table 9](#)

$\text{MAX}_t^{MS(i)}$ = The maximum annual benefit and conditions of the Maggiorazione Sociale for each social assistance system for an individual in year t —These values can be found at the following tables:

- Minimum pension: [Table 5](#) for individuals age 65 and older; [Table 11](#) for individuals age 70 and older
- Pensione Sociale: [Table 6](#) for individuals aged 70 or more
- Assegno Sociale: [Table 12](#) for individuals aged 70 or more

- $TR_{c,t}$ = Combined annual couple income threshold = $TR_{i,t} + SA_t$

SA_t = The maximum annual benefit from Assegno Sociale since 1996 and from Pensione Sociale before 1995 for an individual in year t —These values can be found at the following tables:

- Before 1996: [Table 7](#)
- Since 1996: [Table 9](#)

- $\text{Income}_{i,t}$ = Individual i 's annual taxable income at time t , including old-age pension benefits
- $\text{Income}_{c,t}$ = Couple c 's annual taxable income at time t , including old-age pension benefits

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Table 8: Social Allowance (Assegno Sociale) - Annual Income Thresholds

| Year | Personal Income | Couple Income Threshold |
|------|-----------------------|-------------------------|
| 1996 | 3,222.69 € | 6,445.38 € |
| 1997 | 3,348.24 | 6,696.48 |
| 1998 | 3,405.31 | 6,810.62 |
| 1999 | 4,138.13 | 8,276.27 |
| 2000 | 4,325.11 | 8,650.24 |
| 2001 | 4,437.57 | 8,875.16 |
| 2002 | 4,557.41 | 9,114.82 |
| 2003 | 4,666.87 | 9,333.74 |
| 2004 | 4,783.61 | 9,567.22 |
| 2005 | 4,879.29 | 9,758.58 |
| 2006 | 4,962.36 | 9,924.72 |
| 2007 | 5,061.68 | 10,123.36 |
| 2008 | 5,147.74 | 10,295.48 |
| 2009 | 5,312.58 | 10,625.16 |
| 2010 | 5,349.89 | 10,699.78 |
| 2011 | 5,435.56 | 10,849.80 |
| 2012 | 5,582.33 | 11,164.66 |
| 2013 | 5,749.90 | 11,499.80 |
| 2014 | 5,813.21 | 11,626.42 |
| 2015 | 5,824.91 | 11,649.82 |
| 2016 | 5,824.91 | 11,649.82 |
| 2017 | 5,824.91 | 11,649.82 |
| 2018 | 5,889.00 | 11,778.00 |
| 2019 | 5,953.87 | 11,907.74 |
| 2020 | 5,983.64 | 11,967.28 |
| 2021 | 5,983.64 | 11,967.28 |
| 2022 | 6,079.45 ¹ | 12,158.90 ¹ |

Note:¹ Provisional values

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Formula 6: Benefit Formula for Social Allowance (Assegno Sociale) Benefits

$$B_{SA(AS),i,t} = \begin{cases} 0 & \text{if not married and } \text{Income}_{i,t} > AS_t \\ \frac{AS_t - \text{Income}_{i,t}}{13} & \text{if not married and } \text{Income}_{i,t} < AS_t \\ 0 & \text{if married and } \text{Income}_{c,t} > 2 \times AS_t \\ \frac{2 \times AS_t - \text{Income}_{c,t}}{13} & \text{if married and } \text{Income}_{c,t} < 2 \times AS_t \end{cases}$$

- $B_{SA(AS),i,t}$ = Individual i 's monthly social assistance benefits due to Assegno Sociale at time t
- AS_t = Annual Assegno Sociale level at time t —See [Table 9](#) for values by year
- $\text{Income}_{i,t}$ = Individual i 's annual taxable income at time t , including old-age pension benefits
- $\text{Income}_{c,t}$ = Couple c 's annual taxable income at time t , including old-age pension benefits

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Table 9: Social Allowance (Assegno Sociale) - Maximum Benefit Levels

| Year | Monthly | Yearly |
|------|---------------------|-----------------------|
| 1996 | 247.90 € | 3,222.70 € |
| 1997 | 257.56 | 3,348.28 |
| 1998 | 261.95 | 3,405.35 |
| 1999 | 318.32 | 4,138.16 |
| 2000 | 332.39 | 4,321.07 |
| 2001 | 341.35 | 4,437.55 |
| 2002 | 350.57 | 4,557.41 |
| 2003 | 358.99 | 4,666.87 |
| 2004 | 367.97 | 4,783.61 |
| 2005 | 375.33 | 4,879.29 |
| 2006 | 381.72 | 4,962.36 |
| 2007 | 389.36 | 5,061.68 |
| 2008 | 395.98 | 5,147.74 |
| 2009 | 408.66 | 5,312.58 |
| 2010 | 411.53 | 5,349.89 |
| 2011 | 418.12 | 5,435.56 |
| 2012 | 429.41 | 5,582.33 |
| 2013 | 442.30 | 5,749.90 |
| 2014 | 447.17 | 5,813.21 |
| 2015 | 448.07 | 5,824.91 |
| 2016 | 448.07 | 5,824.91 |
| 2017 | 448.07 | 5,824.91 |
| 2018 | 453.00 | 5,889.00 |
| 2019 | 457.99 | 5,953.87 |
| 2020 | 460.28 | 5,983.64 |
| 2021 | 460.28 | 5,983.64 |
| 2022 | 476.65 ¹ | 6,079.45 ¹ |

Notes:

¹ Provisional values

- Yearly social assistance pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 10: Adjustment of Full Eligibility Age for Assegno Sociale (Social Allowance) Based on Increases in Life Expectancy

| Year | FEA |
|------|-----------------------|
| 2012 | 65 years |
| 2013 | 65 years and 3 months |
| 2014 | 65 years and 3 months |
| 2015 | 65 years and 3 months |
| 2016 | 65 years and 7 months |
| 2017 | 65 years and 7 months |
| 2018 | 66 years and 7 months |
| 2019 | 67 years |
| 2020 | 67 years |
| 2021 | 67 years |
| 2022 | 67 years |
| 2023 | 67 years |
| 2024 | 67 years |

Sources: Decree-Law 78/2010 - Art. 12 ([Gazzetta Ufficiale, 2010](#)), Law n. 214/2011 ([Gazzetta Ufficiale, 2011](#)), Ministerial Decree of December 16, 2014 ([Gazzetta Ufficiale, 2014](#)), Ministerial Decree of December 5, 2017 ([Gazzetta Ufficiale, 2017](#)), Ministerial Decree of November 5, 2019 ([Gazzetta Ufficiale, 2019](#)), Ministerial Decree of October 27, 2021 ([Gazzetta Ufficiale, 2021](#))

Formula 7: Lower Age Requirements Due to Contribution Years for Extra Increases in Social Assistance programs

$$EY_i = \begin{cases} 70 & \text{if } 0 \leq CY_i < 5 \\ 69 & \text{if } 5 \leq CY_i < 10 \\ 68 & \text{if } 10 \leq CY_i < 15 \\ 67 & \text{if } 15 \leq CY_i < 20 \\ 66 & \text{if } 20 \leq CY_i < 25 \\ 65 & \text{if } CY_i \geq 25 \end{cases}$$

- EY_i = Individual i 's eligibility years
- CY_i = Individual i 's contribution years

Sources: Authors' interpretation of formulas from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022.

Table 11: Maggiorazione Sociale of the Minimum Pension (70 years and older) - Values and Annual Income Thresholds

| Year | Monthly increase | Yearly increase | Individual threshold income | Couple threshold income |
|------|------------------|-----------------|-----------------------------------|-------------------------------|
| 2002 | 123.77 € | 1,609.01 € | 6,713.98 € | 11,271.39 € |
| 2003 | 123.77 | 1,609.01 | 6,836.57 | 11,503.44 |
| 2004 | 123.77 | 1,609.01 | 6,967.35 | 11,750.96 |
| 2005 | 123.77 | 1,609.01 | 7,074.60 | 11,953.89 |
| 2006 | 123.77 | 1,609.01 | 7,167.55 | 12,129.91 |
| 2007 | 123.77 | 1,609.01 | 7,278.83 | 12,340.51 |
| 2008 | 136.44 | 1,773.72 | 7,540.00 | 12,687.74 |
| 2009 | 136.44 | 1,773.72 | 7,724.60 | 13,037.18 |
| 2010 | 136.44 | 1,773.72 | 7,766.33 | 13,116.22 |
| 2011 | 136.44 | 1,773.72 | 7,862.27 | 13,297.83 |
| 2012 | 136.44 | 1,773.72 | 8,026.72 | 13,609.05 |
| 2013 | 136.44 | 1,773.72 | 8,214.31 | 13,964.21 |
| 2014 | 136.44 | 1,773.72 | 8,285.16 | 14,098.37 |
| 2015 | 136.44 | 1,773.72 | 8,298.29 | 14,123.20 |
| 2016 | 136.44 | 1,773.72 | 8,298.29 | 14,123.20 |
| 2017 | 136.44 | 1,773.72 | 8,298.29 | 14,123.20 |
| 2018 | 136.44 | 1,773.72 | 8,370.18 | 14,259.18 |
| 2019 | 136.44 | 1,773.72 | 8,442.85 | 14,396.72 |
| 2020 | 136.44 | 1,773.72 | 8,476.26 | 14,459.90 |
| 2021 | 136.44 | 1,773.72 | 8,476.26 | 14,459.90 |
| 2022 | 136.44 | 1,773.72 | 8,583.51 ¹ | 14,662.96 ¹ |

Notes:

¹ Provisional values

- Yearly social assistance pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by **INPS** [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Table 12: Maggiorazione Sociale of the Assegno Sociale - Values and Annual Income Thresholds

| Year | Monthly increase | Annual limit of increased pension | of minimum | Individual income threshold | Couple income threshold |
|------|---------------------|-----------------------------------|------------|-----------------------------|-------------------------|
| 2002 | 165.89 € | 2,156.57 € | | 6,713.98 € | 11,271.39 € |
| 2003 | 166.90 | 2,169.70 | | 6,836.57 | 11,503.44 |
| 2004 | 167.98 | 2,183.74 | | 6,967.35 | 11,750.96 |
| 2005 | 168.87 | 2,195.31 | | 7,074.60 | 11,953.89 |
| 2006 | 169.63 | 2,205.19 | | 7,167.55 | 12,129.91 |
| 2007 | 170.55 | 2,217.15 | | 7,278.83 | 12,340.51 |
| 2008 | 184.02 | 2,392.26 | | 7,540.00 | 12,687.74 |
| 2009 | 185.54 | 2,412.02 | | 7,724.60 | 13,037.18 |
| 2010 | 185.88 | 2,416.44 | | 7,766.33 | 13,116.22 |
| 2011 | 186.67 | 2,426.71 | | 7,862.27 | 13,297.83 |
| 2012 | 188.03 | 2,444.39 | | 8,026.72 | 13,609.05 |
| 2013 | 189.57 | 2,464.41 | | 8,214.31 | 13,964.21 |
| 2014 | 190.15 | 2,471.95 | | 8,285.16 | 14,098.37 |
| 2015 | 190.86 | 2,481.18 | | 8,306.09 | 14,131.00 |
| 2016 | 190.86 | 2,481.18 | | 8,306.09 | 14,131.00 |
| 2017 | 190.86 | 2,481.18 | | 8,306.09 | 14,131.00 |
| 2018 | 190.86 | 2,481.18 | | 8,370.18 | 14,259.18 |
| 2019 | 191.46 | 2,488.98 | | 8,442.85 | 14,396.72 |
| 2020 | 191.74 | 2,492.62 | | 8,476.26 | 14,459.90 |
| 2021 | 191.74 | 2,492.62 | | 8,476.26 | 14,459.90 |
| 2022 | 192.62 ¹ | 2,504.06 ¹ | | 8,583.51 ¹ | 14,662.96 ¹ |

Notes:¹ Provisional values

- Yearly social assistance pension benefits take the form of 13 monthly payments

Sources: Authors' collection of data deriving from publications of [Circulars on Renewal of Equalization Tables](#), published yearly by INPS [Istituto Nazionale della Previdenza Sociale - National Institute of Social Security], 1992-2022. Values until 2001 have been converted from Italian Liras (ITL) into Euros (EUR) following the conversion rate: 1 EUR = 1,936.27 ITL.

Sources

This section records key sources consulted when we collected the institutional details reported in this document. Archived versions of these sources are available at the Gateway Policy Explorer website (<http://g2aging.org/policy-explorer>).

European Commission (2021). Employment, Social Affairs & Inclusion, Italy: Social inclusion and income support measures. [\[Link\]](#)

Gazzetta Ufficiale (1969). Legge 30 aprile 1969, n. 153 - Revisione degli ordinamenti pensionistici e norme in materia di sicurezza sociale [Law No. 153 of April 30, 1969 - Revision of pension systems and social security regulations], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], April 30, 1969. [\[Link\]](#)

Gazzetta Ufficiale (1983). Decreto Legge 12 settembre 1983, n. 463 - Misure urgenti in materia previdenziale e sanitaria e per il contenimento della spesa pubblica, disposizioni per vari settori della pubblica amministrazione e proroga di taluni termini [Law no. 463 of September 12, 1983 - Urgent measures regarding social security and health and for the containment of public spending, provisions for various sectors of the public administration and extension of certain terms], Gazzetta Ufficiale della Repubblica Italiana, tramite Normattiva [Official Gazette of the Italian Republic, through Normattiva], September 12, 1983. [\[Link\]](#)

Gazzetta Ufficiale (1995). Legge 8 agosto 1995, n. 335 - Riforma del sistema pensionistico obbligatorio e complementare [Law no. 335 of August 8, 1995 - Reform of the compulsory and complementary pension system], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], August 8, 1995. [\[Link\]](#)

Gazzetta Ufficiale (2001). Legge 28 dicembre 2001, n. 448 - Disposizioni per la formazione del bilancio annuale e pluriennale dello Stato (legge finanziaria 2002) [Law no. 448 of December 28, 2001 - Provisions for drawing up the annual and pluriannual budget of the State (Budget Law 2002)], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], December 28, 2001. [\[Link\]](#)

Gazzetta Ufficiale (2008). Legge 6 agosto 2008, n. 133 - Conversione in legge, con modificazioni, del decreto-legge 25 giugno 2008, n. 112, recante disposizioni urgenti per lo sviluppo economico, la semplificazione, la competitività, la stabilizzazione della finanza pubblica e la perequazione tributaria. [Law no 133 of August 6, 2008 - Conversion into law, with amendments, of the decree-law of 25 June 2008, n. 112, containing urgent provisions for economic development, simplification, competitiveness, stabilization of public finance and tax equalization.], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], August 6, 2008. [\[Link\]](#)

Gazzetta Ufficiale (2010). Decreto-Legge 31 maggio 2010, n. 78 Art. 12 - Misure urgenti in materia di stabilizzazione finanziaria e di competitività economica. [Art. 12 of Decree-Law no. 78 of May 31, 2010 - Urgent measures regarding financial stabilization and economic competitiveness.], May 31, 2010. [\[Link\]](#)

Gazzetta Ufficiale (2011). Decreto Legge 6 dicembre 2011, n. 201 Art. 24 - Disposizioni urgenti per la crescita, l'equità e il consolidamento dei conti pubblici [Art. 24 of Law Decree no. 201 of December 6, 2011 - Urgent provisions for growth, equity and consolidation of public accounts], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], December 6, 2011. [\[Link\]](#)

Gazzetta Ufficiale (2014). Decreto del Ministero dell'Economia e delle Finanze del 16 dicembre 2014 - Adeguamento dei requisiti di accesso al pensionamento agli incrementi della speranza di vita. [Ministry of Economy and Finance Decree of December 16, 2014 - Adjustment of retirement access requirements to increases in life expectancy.], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], December 16, 2014. [\[Link\]](#)

Gazzetta Ufficiale (2017). Decreto del Ministero dell'Economia e delle Finanze del 5 dicembre 2017 - Adeguamento dei requisiti di accesso al pensionamento agli incrementi della speranza di vita. [Ministry of Economy and Finance Decree of December 5, 2017 - Adjustment of retirement access requirements to increases in life expectancy.], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], December 5, 2017. [\[Link\]](#)

Gazzetta Ufficiale (2019b). Decreto del Ministero dell'Economia e delle Finanze del 5 novembre 2019 - Adeguamento dei requisiti di accesso al pensionamento agli incrementi della speranza di vita a decorrere dal 1 gennaio 2021. [Ministry of Economy and Finance Decree of November 5, 2019 - Adjustment of retirement access requirements to increases in life expectancy from January 1, 2021.], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], November 5, 2019. [\[Link\]](#)

Gazzetta Ufficiale (2021). Decreto del Ministero dell'Economia e delle Finanze del 27 ottobre 2021 - Adeguamento dei requisiti di accesso al pensionamento agli incrementi della speranza di vita. [Ministry of Economy and Finance Decree of October 27, 2021 - Adjustment of retirement access requirements to increases in life expectancy.], Gazzetta Ufficiale della Repubblica Italiana [Official Gazette of the Italian Republic], October 27, 2021. [\[Link\]](#)

the Italian Republic], October 27, 2021. [\[Link\]](#)

INPS (1992 - 2021). Database Circolari su Rinnovo Tabelle di Rivalutazione delle Pensioni [Database of Circulars on Renewal of Equalization Tables].

Note: Readers can find relevant circulars and documentations on the database by searching keywords and filtering by reference dates. [\[Link\]](#)

ISTAT (2021). National Indices of Consumer Prices for Families of Workers and Employees - Monetary Revaluation Tables. [\[Link\]](#)

OECD (2005 - 2021). Pensions at a Glance: Country Profiles - Italy. [\[Link\]](#)

Social Security Administration (1993 - 1999). Social Security Programs Throughout the World. [\[Link\]](#)

Social Security Administration (2002 - 2018). Social Security Programs Throughout the World. [\[Link\]](#)

Glossary of terms

This section summarizes key definitions from the main text. To facilitate switching back and forth, this document is designed with hyperlinks. Most PDF readers have shortcuts that permit a reader to return to the previous location after selecting a hyperlink. In Adobe Acrobat on a PC: “Alt” + “←”; In Adobe Acrobat on a MAC: “command” + “←”; In Preview on a MAC: “command” + “[”.

Assegno Sociale: Old-age, non-contributory social assistance program started in 1996 that provides a monthly benefit to all Italian and EU citizens residing in Italy over the age of 65 who do not receive old-age pension benefits, based on certain income conditions. This program replaced Pensione Sociale in 1996, based on the 1995 Dini Reform.

Claimable Benefit: A pension where the beneficiary must actively file a claim for benefits with the government’s pension authority.

Benefit Class 1: Workers with at least 18 contribution years on January 1, 1996. These workers have their old-age benefit determined by the DB system.

Benefit Class 2: Workers with non-zero but less than 18 contribution years on January 1, 1996. These workers are eligible to retain their entitlements in the DB system accumulated through 1995, but all future entitlements were accrued in the NDC system.

Benefit Class 3: New workers making their first social insurance contributions on or after January 1, 1996. These workers have their old-age benefit determined by the NDC system.

Benefit Class 1 after 2011 Fornero Reform: Workers with at least 18 contribution years on January 1, 1996. After 2011 Fornero Reform, these workers are eligible to retain their entitlements in the DB system accumulated through 2011, but all future entitlements were accrued in the NDC system.

Benefit Class: The 1996 Dini Reform created a separate old-age benefit system for workers based on their work history. Based on a person’s work history on January 1, 1996, we define three distinct “classes” of workers and each class has its own benefit eligibility rules and formulas. This terminology is not used by INPS, but helps the authors to concisely convey information about old-age benefit plan design.

Cost-of-Living Adjustments (COLA): Adjustments after an individual begins receiving benefits that increase benefit payments, typically in line with consumer prices or average earnings.

Defined Benefit system (DB): An old-age benefit system where a worker’s benefits paid at retirement are based on a defined formula typically consisting of contribution years, a measure of final average earnings and a multiplier (sometimes known as an accrual factor).

Eligibility Track A (1992-2011): “Pensioni di Anzianità”: Translated as “seniority pension,” pensioni di anzianità is an eligibility track for unreduced old-age benefits that is based primarily on contribution years, although options with age requirements were introduced from 1996.

Eligibility Track Q: “Quota 100”: Quota 100 is an experimental eligibility track for unreduced old-age benefits, active for workers who have accrued 62 years of age and 38 years of contributions during the three-year period between 2019 and 2021.

Eligibility Track V: “Pensioni di Vecchiaia”: Translated as “old-age pension”, pensioni di vecchiaia is an eligibility track for unreduced old-age benefits that is based primarily on age with a minimal number of required contribution years.

Eligibility Track 3: : New eligibility track for unreduced old-age benefits introduced by Dini Reform (Law 335/1995), exclusive to workers entering the workforce after January 1, 1996. This eligibility track presents two requirements’ options to start benefit, one based primarily on age with a minimal number of required contribution years (broadly similar to the “Pensioni di Vecchiaia” eligibility track, and the other based primarily on contribution years (broadly similar to the “Pensioni di Anzianità” eligibility track).

Eligibility Track: Requirements for an individual to start receiving an unreduced old-age pension benefit. An individual typically must satisfy only one eligibility track.

Full Eligibility Age: The age at which individuals are eligible to receive their full benefit. For dependent benefits or social assistance, the full eligibility age may differ from the statutory retirement age for own old-age pension benefits.

Imposta sul Reddito delle Persone Fisiche - IRPEF: Personal income tax in Italy

Italian National Institute of Statistics (Istituto Nazionale di Statistica - ISTAT): The Italian National Institute of Statistics is a public research institution responsible for the production of official statistical data in Italy.

National Social Security Institute (Istituto Nazionale della Previdenza Sociale - INPS): The administering agency of Italy’s social insurance and assistance benefits.

Notional Defined Contribution system (NDC): An old-age benefit system where a worker’s contributions earn a rate of return determined by the government. At retirement, the accumulated contributions and returns are converted into a lifetime monthly benefit. The system is notional in that a worker does not have an individual account accruing returns, just a commitment from the government to provide the benefits as designed.

Pensione Sociale: Old-age, non-contributory social assistance program that provides a monthly benefit to all Italian and EU citizens residing in Italy over the age of 65 who do not receive old-age pension benefits, based on certain income conditions. This program was replaced by Assegno Sociale in 1996 based on the 1995 Dini Reform. Eligibility for Pensione Sociale continued for persons already receiving such benefit on January 1, 1996 and remaining continuously eligible.

Qualified Benefit: A benefit is qualified if an individual must continue to meet certain standards, such as a means test, to continue receipt of benefits.

Statutory Retirement Age (SRA): The age at which individuals are eligible to receive their full benefit. In the United States, this is known as the normal retirement age. In the United Kingdom, this is known as the state pension age.

Version information

Current Version: 2.0 (August 2023)

Version History

- 1.0 (May 2022): First version
- 2.0 (August 2023): Revisions to policy period 2002-2019 include adding policies introduced since 2010 (these policies had been reflected in the previous version, just not identified), extended policy period from 2019 to 2022, and updated formatting and terminology

Additional resources

The following resources provide additional details for the interested reader:

FNP (CISL) – Federazione Nazionale Pensionati. Available at <https://www.pensionati.cisl.it/pubblicazioni/>

Features: FNP (CISL) is the National Association of Pensioners and Elders formed by CISL union (Italian Confederation of Workers’ Trade Unions). This association helps pensioners and elders to apply and present the adequate documentation for their application to all the

old-age social security services and schemes. It also investigates and presents reports, data and documentation for the purpose of informing the general population on their rights and duties regarding pensions and social assistance.

Gazzetta Ufficiale della Repubblica Italiana. Available at: <https://www.gazzettaufficiale.it/>

Features: Official database for the Italian legislation, laws and acts over the years.

INPS Acts and Documentation's database. Available at: <https://www.inps.it/inps-comunica/atti>

Features: Official database of acts, internal communications and official documents from the Italian institute of social security (INPS – Istituto Nazionale della Previdenza Sociale) over the years. It contains useful documents and data on all aspects of the Italian pension system.

PensioniOggi.it. Available at: <https://www.pensionioggi.it/>

Features: Online portal, constituted by labor and welfare lawyers and registered accountants, that investigates the Italian pension system and provides summaries, tables and explanations on different topics, both specific and general.