

THE SOCIAL QUESTION, RURAL WELFARE AND ECONOMIC CAPITALIZATION AT MUNICIPAL LEVEL¹

A QUESTÃO SOCIAL, A PREVIDÊNCIA RURAL E A CAPITALIZAÇÃO ECONÔMICA DA ESCALA MUNICIPAL

LA CUESTIÓN SOCIAL, LA PREVISIÓN RURAL Y LA CAPITALIZACIÓN ECONÓMICA DE LA ESCALA MUNICIPAL

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Abstract

Social welfare, particularly during periods of fiscal crisis, is viewed as a villain of Brazil's budget deficit. To go beyond the accounting discourse rejected by the literature, understanding the constitutive nature of rural welfare is of major importance. Rural welfare policy is located within a political space stemming from a kind of solidarity pact between the fiscal and the social states. It comprises, as well as insurance, an effective type of social assistance with a specific spatiality. Since its undeniable impact on the gradual reduction of poverty in rural areas during its first period of institutionalization in the early 1970s, rural welfare became one of the major capitalization policies of municipal economies as from the early 1990s, particularly in cities with populations of less than 20,000, which made up 68% of the total number of cities in Brazil in 2015 (Brasil, 2015). This article claims that rural welfare, as a variant of the social question, is part of the Brazilian welfare state, signalling, in a specific sense, towards the social issue in rural areas and, in a broader sense, towards the capitalization of municipal economies in a considerable part of the national territory.

Keywords: Rural Welfare, Welfare State, Social Question.

Resumo

A Previdência Social, especialmente nos propalados momentos de crise fiscal, é colocada como vilã do déficit nas contas públicas brasileiras. Para além do discurso contábil, refutado pela literatura, é necessário compreender a natureza constitutiva da Previdência Rural. A política previdenciária rural localiza-se em um espaço político, resultado de uma espécie de pacto de solidariedade entre o Estado Fiscal e o Estado Social. Além de um seguro, a Previdência Rural constitui-se em um tipo eficiente de assistência social, com uma espacialidade específica. Ao inequívoco impacto na progressiva redução da pobreza no espaço rural, no primeiro momento de sua institucionalização, no início da década de 1970, a Previdência Rural, especialmente a partir do início da década de 1990, transformou-se em uma das principais políticas de capitalização das economias municipais, sobretudo nos municípios com população abaixo de 20 mil habitantes, universo que compreendeu, em 2015, 68% dos municípios brasileiros (Brasil, 2015). Como uma variante da questão social, argumentamos que a Previdência Rural é parte constitutiva do Estado Social brasileiro, respondendo, de forma específica, pela questão social no campo brasileiro e, de forma geral, pela capitalização das economias municipais em parcela significativa do território nacional.

Palavras-chave: Previdência Rural, Estado Social, Questão Social, JEL: I38.

Resumen

La Previsión Social, específicamente en los propalados momentos de crisis fiscal, y situada como la villana del déficit en las cuentas públicas brasileñas. Además del discurso contable, desmentido por la literatura, es necesario comprender la naturaleza constitutiva de la Previsión Rural. La política de previsión rural se sitúa en un espacio político, resultado de una especie de pacto de solidaridad entre el Estado Fiscal y el Estado

Social. Además de un seguro, la Previsión Rural es un tipo eficaz de asistencia social, con una espacialidad específica. Ante el inequívoco impacto en la progresiva reducción de la pobreza en el espacio rural, al inicio de su institucionalización, a principios de la década de 1970, la Previsión Rural, especialmente a partir del inicio de la década de 1990, se transformó en una de las principales políticas de capitalización de las economías municipales, sobre todo en los municipios con poblaciones abajo de 20 mil habitantes, un universo que abarcó, en 2015, 68% de los ayuntamientos brasileños (Brasil, 2015). Como una variante de la cuestión social, argumentamos que la Previsión Rural es parte constitutiva del Estado Social Brasileño, respondiendo, de forma específica, por la cuestión social en el campo brasileño y, de forma general, por la capitalización de las economías municipales en parte significativa del territorio nacional.

Palabras clave: Previsión Rural, Estado Social, Cuestión Social, JEL: I38.

The fiscal state and the welfare state

There are three conventional ways of understanding the emergence and evolution of national states. The first is territorial dimension, shaped by the founding movement of the state and the nation; this perspective is explored by Eric Hobsbawm (1990). The state is thus defined as a territorial entity, characterized by territoriality and demarcated by relatively stable boundaries within which it exerts its sovereignty. Within these boundaries, political cohesion is ensured by various federative pacts and by a set of interests negotiated by groups in the political arena. Parallel to the process of territorial formation, the fiscal state undergoes continuous improvements to meet management demands. Economic intervention through regulated relations between capital and labour is also part of the broader set of attributions of the fiscal state. The welfare state emerges, as it were, between the national and the fiscal states. Taxation is required not only to regulate activities and manage the territory, but also to promote social cohesion in distinct formats. To belong to a state means, in a way, to inscribe oneself in a political order of security, marked out by the fiscal arena, on the one hand, and by citizenship, on the other. That is how the welfare state came into being, over the course of a trajectory that began in the late nineteenth century and peaked during the post-war period, which became known in Europe as “The Glorious Thirty”.²

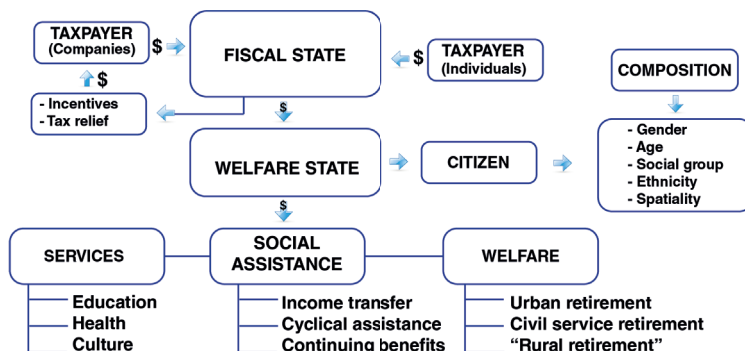


Figure 1 - Flow chart illustrating the relation between the fiscal and the welfare states

Source: Designed by the author (2016).

The relation between the fiscal and the welfare states reveals that the struggle for social cohesion relied both on fiscal empowerment and on a distributive political role, in the sense given by David Harvey (2008). The centrality of the social question gives the welfare state its distinctive mark. It is part of the latter's constitutive nature, expressed through a focal concern for poverty or a more general concern for guaranteeing social services such as education and health. Robert Castel (2015, p. 30, my translation), in his book *Les métamorphoses de la question sociale* ["The metamorphoses of the social question"], produces a genealogy of the social question that highlights the importance of the welfare state:

The "social question" is a fundamental aporia over which a society experiments the enigma of its cohesion and attempts to conjure the risk of its fracture. It is a challenge that brings into question the ability of a society (which, in political terms, is referred to as a nation) to exist as a set connected by interdependence relations.

The social question is, at the same time, abstract, derived from society's legitimate questioning of the role of different social groups in the nation's construction, and concrete, resulting from the way the national state inserts social demands in its working agenda on the territory. The welfare state is the centralizing apparatus of social protection networks and, therefore, an institution that takes responsibility for social cohesion to the detriment of the market. Piketty (2014), in his study on the contemporary income concentration regime, shows how the state's involvement, grounded on a constant revenue flow, was crucial in ensuring its "social missions". Piketty divides such missions into two main categories: a)

health and education expenses and b) income from substitution and transfer. In this sense, both Piketty (2014) and Atkinson (2015) argue that public pension systems in Europe have been vital in reducing old-age poverty. According to Atkinson (2015, p. 95, my translation): “The maturity of state pensions reduced the outreach of poverty among the elderly, and the outreach of social transfers to other groups, such as that of disabled people, broadened the effectiveness of the social security network”.

The welfare state, following Castel’s (2015) argument, emerges with working society. Its evolution throughout the twentieth century responded to political demands stemming from the development of industrial capitalism and from the need to establish social protection systems and social policies in line with the state of affairs of industrial society.³ It is not by chance that the welfare state ensures, through force of law, a wide range of social rights spanning from the minimum wage to social security, having as its traits universality and non-distinction between men and women. It is within the welfare state’s political scenario that one must place the debate concerning social welfare, in a broad sense, and social security, in a specific sense.⁴

Rural welfare and reduction of poverty in the countryside

Social welfare may be defined as a social protection system comprising a target populational group, of a specific age range and differential entry into the formal job market. Retirement is one of the most well-known forms of this protection system, which also includes survivor’s and disability pensions, accident-related benefits, and assistance for associates. The *political, economic, and demographic contexts* are crucial for shedding light on the evolution of social welfare. The *political context* encompasses the options laid out to the state, within the political arena of interests, in assuming the social role of providing assistance to workers, whether during employment activities or in old age. The state emerges, in this sense, as a regulator, manager, and financier of social welfare. The *economic context* refers to the analysis of the job market’s expansion or retraction and the consequent regulation of the participation regime between companies, the state, and policyholders. The *demographic context* comes through with the notion of life expectancy, translated into populational ageing, which resonates directly on welfare expenses. The

debate over Brazil's welfare deficit, present also in other countries, can be located within these contexts.⁵

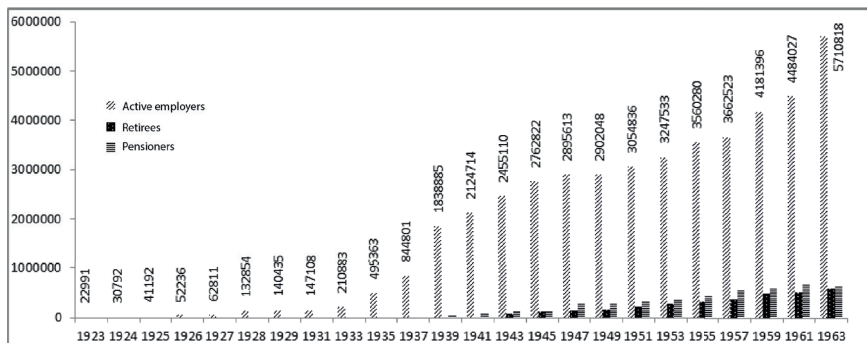


Figure 2 - Evolution of the number of people associated with pension plans and institutes

Source: Oliveira & Teixeira (1989).

Note: Data compiled by the author.

The origin of social welfare in Brazil is summarized by Figure 2. Such a history is at once corporative, state-oriented, demographic, and economic. Back in the days of the empire, Decree-Law No. 9,912, which addressed the reform of mail services, granted “ordinary retirement pensions” for employees aged 60 and with thirty years of service, as well as “extraordinary retirement pensions” for those with ten years of service who were unable to carry out their tasks (Brasil, 1888). Despite having been discussed in several laws and in various formats over the course of the nineteenth century, the Brazilian welfare system only came into actual existence with the so-called Eloy Chaves Law, passed in 1923 (Brasil, 1923). The law established the Retirement and Pension Fund for the employees of railway companies, which was to provide ordinary retirement for those with thirty years of service and 50 of age, or disability retirement for those who, after ten years of service, were unable to carry out their work activities; a pension regime was also determined by the legal text. The central role played by railways in an agroexporting economy, typical of Brazil’s First Republic, combined with pressure from railway workers, influenced the implementation of this retirement system. The increase in the number of retirees and pensioners up to 1936 progressed side by side with an increase in the number of retirement funds and pension institutes.

According to data presented by Oliveira & Teixeira (1989), Brazil had 24 retirement and pension institutes and funds back in 1923, 44 in 1928, 164 in 1933, and 183 in 1936. From that year on the number decreased until it reached 35 in 1949. The relation between the number of active workers and that of retirees and pensioners during this period offers an interesting scenario: in 1929, the latter group amounted to 7.68% of the total, rising to 16.24% in 1950 and to 21.53% in 1963.

Such an increase in the number of beneficiaries exposes two factors. The first is institutional, manifested by the creation and expansion of retirement and pension institutes; for instance, Decree No. 22,872, passed on June 29, 1933 (Brasil, 1933), set up the Retirement and Pension Institute for Maritime Workers. Corporative institutes were created following this model, such as those representing bank employees (Brasil, 1934) and dockers (Brasil, 1939). The incorporation of functional segments from the job market reveals the corporative nature of social welfare during this period. According to Decree No. 72, passed in 1966, two years into the military regime, retirement institutes were to be incorporated into the National Institute of Social Welfare [Instituto Nacional de Previdência Social – INPS]. Centralization in the federal government is confirmed by Article 4, according to which the president of INPS is to be designated by the President of the Republic, following recommendation by the Ministry of Labour and Social Welfare.⁶ The change is significant, given that medical/hospital assistance and derived services were incorporated into the system, thereby reinforcing ties with the private sector. In establishing such ties, social welfare began to represent a lucrative business for private groups linked to the medical/hospital sector.

Region	Urban Areas				Rural Areas			
	1940	1950	1960	1970	1940	1950	1960	1970
North	405,792	580,867	972,331	1,626,600	1,056,628	1,263,768	1,607,111	1,977,260
North-East	3,381,173	4,744,808	7,552,781	11,752,977	11,052,907	13,228,605	14,604,109	16,358,950
South-East	7,231,905	10,720,734	17,581,228	28,964,601	11,113,926	11,827,760	13,142,689	10,888,897
South	1,590,475	2,312,985	4,411,606	7,303,427	4,144,830	5,527,885	7,370,026	9,193,066
Centre-West	270,837	423,497	1,015,735	2,437,379	987,842	1,313,468	1,933,754	2,635,880
BRAZIL	12,880,182	18,782,891	31,533,681	52,084,984	28,356,133	33,161,486	38,657,689	41,054,053

Figure 3 - Brazilian population living in urban and rural areas

Source: Brazil (1977).

The second factor is that data outlines a progressively industrialized scenario which tended to focus on urban welfare and formal employment while leaving uninsured a considerable part of the Brazilian population, particularly those living in the countryside. The country witnessed the simultaneous rise of both urban and rural populations, propelled by high birth rates. In 1970, 44% of Brazilians still lived in rural areas. With the exception of the South-East region in the 1960-1970 interval, the other macroregions saw an increase in the rural population from 1940 to 1970. Country areas in the South-East faced the departure of 2,253,792 people between 1960 and 1970. The concentration of the urban population mirrored that of the transformation industry and, consequently, of formal employment, which had a direct effect on the expansion of social welfare. Not by chance, in 1970 São Paulo state accounted for 31.3% of employment record books issued by the Ministry of Labour and Social Welfare (Brasil, 1971b). The South-East as a whole accounted for 62.64% of employment record books issued. The difference in job formalization between the North-East and the South-East resonated in household income and social security, reinforcing a specific spatiality for regional poverty and for income and consumption inequality at national level. It is not by chance that the North-East was at the heart of Brazil's regional issue during the 1950s, the latter being nothing more than the spatial rendering of the social question.

The 1960s and 1970s were particularly characterized by increasing regional exchanges and by industrial concentration in the South-East, especially in São Paulo (Oliveira, 1977). The very modernization of agriculture exposed the dependence of the other macroregions on the South-East as unequal regional exchanges grew. This modernization involved importing agricultural raw materials, machinery, equipment, and fertilizers, all of which were mostly produced and/or processed in the South-East. As can be deduced from the regional data organized by Mainon, Geiger & Baer (1977), the state was the major guarantor of industrialization and of agricultural modernization.

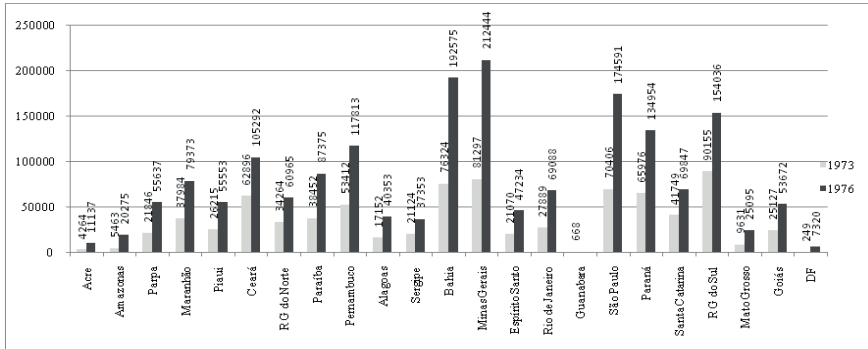


Figure 4 - Total number of benefits maintained by the Rural Workers Assistance Fund [Fundo de Assistência ao Trabalhador Rural – FUNRURAL]

Source: Brasil (1974, 1977).

One of the major changes to Brazil’s social welfare took place in 1971, year in which Complementary Law No. 11 set up the Rural Workers Assistance Programme [Programa de Assistência ao Trabalhador Rural – PRORURAL]. To a certain extent, such a change had already been outlined in the Land Statute, in the form of the Assistance and Welfare Fund for the Rural Worker [Fundo de Assistência e Previdência do Trabalhador Rural] (Brasil, 1963). From the 1970s onwards, the welfare state began to gradually incorporate workers who had so far been considered invisible, both spatially, i.e. by living in the country, and economically, given the lack of formalization in job contracts. The Brazilian countryside, particularly in the North-East, was viewed as a non-productive space inhabited by a homogeneous population that suffered with climate hazards and awaited an opportunity to migrate, a scenario which inadvertently reinforced the land concentration gradients whose origins were denounced in Caio Prado Júnior’s classic study (1987). João Cabral de Melo Neto, in his poem “Morte e vida severina” [“The Death and Life of a Severino”], describes the fate of the sertanejo who leaves the hinterland and heads to the Zona da Mata region, only to conclude that migration had not solved the problems raised by poverty. The poem, published in the late 1950s, offers a blatantly bitter portrait of the sertanejo’s life expectancy. According to Melo Neto, here translated into English by the poet Elizabeth Bishop (2011, p. 153):

And if we Severinos/ are all the same in life,/ we die the same death,/ the same Severino death./ The death of those who die/ of old age before thirty,/ of an ambush before twenty,/ of hunger a little daily./ (The Severino death/ from sickness and from hunger/ attacks at any age,/ even the unborn child.)

At each period of drought, the small north-eastern peasant struggles with the expansion of large estates, with violence and poverty, hazards made worse by the lack of coordination between the feeble regional ecological systems. It was this environment, inscribed in a cartography of land conflicts, that gave rise to the Peasant Leagues. This individual, referred to as peasant, sertanejo, rural worker, squatter, small farmer, etc., had begun to be viewed as a holder of rights, but still did not warrant the same treatment as that attributed to urban workers. Complementary Law No. 11 defines rural worker as an individual entity that offers paid services to a rural employer, as well as

b) the producer, whether or not a property owner, who performs rural activities without employees, individually or under the family economy regime, in which the work of family members is deemed indispensable to their own subsistence and is performed in conditions of mutual dependence and collaboration. (Brasil, 1971b, my translation).

Article 2 of the Complementary Law states that rural workers are entitled to the following benefits: old-age retirement, disability retirement, pension, funeral assistance, healthcare, and social assistance. It is not hard to imagine the impact of such a law on the Brazilian countryside. Unlike urban workers, rural workers find in their properties the means to work and to reproduce their own lives, subsisting under lowly-capitalized agricultural and cattle-raising exploration systems. In 1970 there were 41,054,053 people living in rural areas in Brazil, which at once indicates a repressed demand not promptly met by legal means, in that the proposed benefit was granted only to “a member of the [family] unit” (my translation), designated as its leader or provider. Therefore, the emergence of rural welfare reinforced gender hierarchy. Based on information from the *Anuário Estatístico do Brasil* (Brasil, 1971a), in 1971 48.54% of country residents in Brazil were women, a rate as high as 49.87% in the North-East. In states like Paraíba, Pernambuco, and Sergipe, there were more women living in the countryside than men.

Another major issue refers to age and income. Old-age retirement took place at the age of 65 for both men and women, and the income amounted to 50% of the highest minimum wage registered nationwide. In the case of survivor's pensions, the income amounted to 30% of the minimum wage. It is easy to understand the difficulties in obtaining benefits during those times, given that life expectancy in Brazil was set at 48 years in 1960 and rose to 52.7 years in 1970, whereas in the North-East it was 40 years in 1960 and 43.3 years in 1970 (Brasil, 2000). In 1973 there were 833,613 beneficiaries, whether retirees or pensioners, a number which soared to 1,811,982 in 1976, producing a 117% increase in a four-year interval. The highest absolute increment was recorded in the states of Minas Gerais, Bahia, São Paulo, and Rio Grande do Sul, but the increase was also significant nationwide. An interesting finding is that, in 1973, 93.2% of benefits were granted for old-age retirement, 3.2% for disability retirement, and 3.48% for pensions. In 1976, the respective rates were 69.07%, 6.72%, and 12.5%.⁷ That same year, the North-East recorded the highest average rate of old-age retirement in a rural setting, the leading states being Bahia (81.89%) and Maranhão (81.44%), as shown in Figure 5.

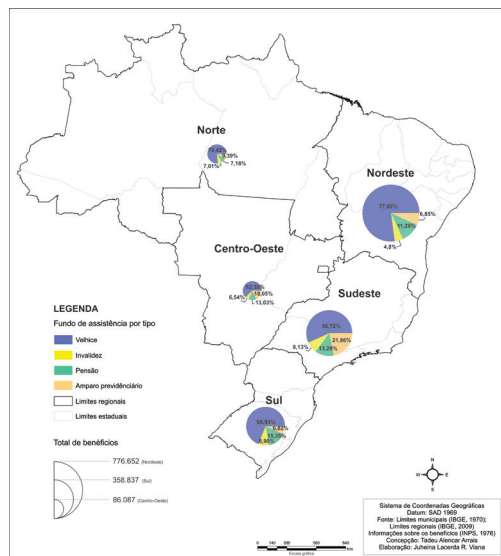


Figure 5 - Benefits maintained by the Rural Workers Assistance Fund per region, in 1976

Source: Brasil (1977).

The comparison between rural and urban retirement pensions at regional level shows a predominance of urban retirement in the South-East (61.41%) in relation to the North-East (28.03%). As for rural retirement, the North-East recorded 42.05% and the South-East 28.03%, which confirms the strength of formal wage labour in the latter region, particularly in states like São Paulo and Rio de Janeiro, as is shown in Figure 6.

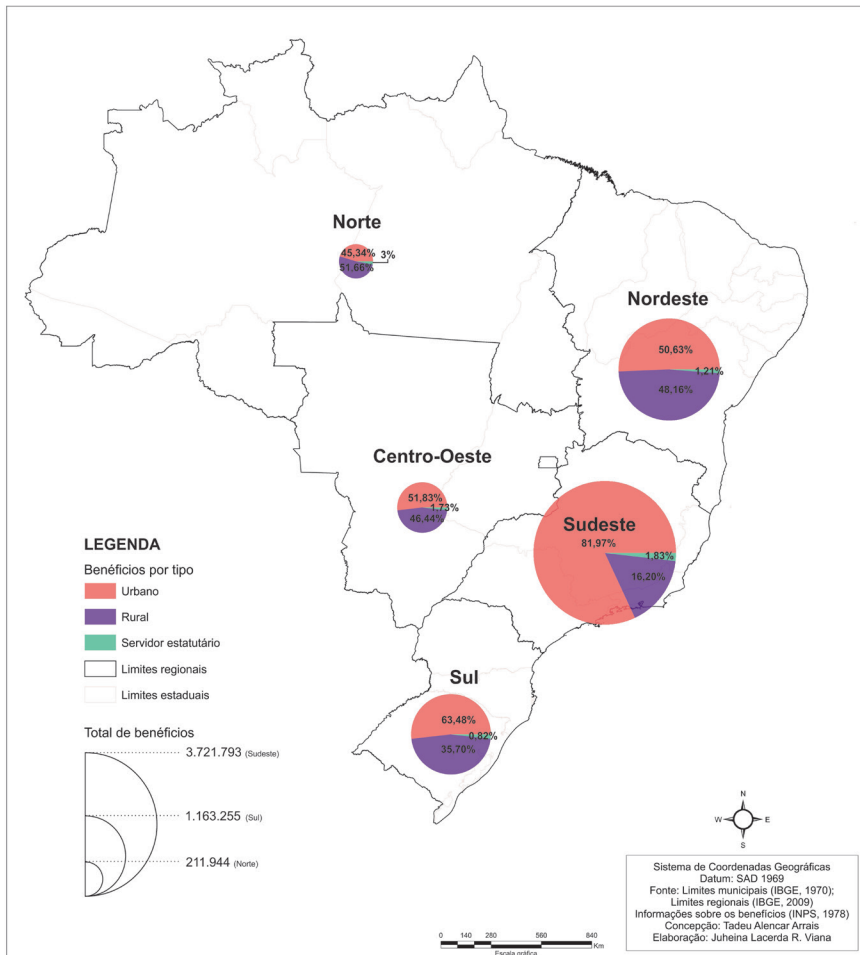


Figure 6 - Benefits maintained by the INPS, per clientele, in 1978

Source: Brasil (1978).

There has been a gradual evolution in the absolute number of beneficiaries, retirement grants, and pensions for country residents. In 1979, 1,430,750 benefits were granted for old-age retirement, 221,855 benefits for disability retirement, and 392,004 pensions, totalling 2,044,609 benefits. The most significant increase was registered in the early 1990s, as a result of legislation changes brought about by the 1988 Constitution (Brasil, 1988). Social welfare was, therefore, incorporated into the list of fundamental social rights. The Organic Law of Social Welfare [Lei Orgânica de Assistência Social – LOAS], passed on December 7, 1993 (Brasil, 1993), reinforces the standing of social assistance within the non-contributive social security policy, whose clearest example is given in Article 2, letter e: “the guarantee of 1 (one) minimum wage payment to be paid monthly to disabled and elderly persons who can offer evidence that they do not possess the means to earn their living or to have it provided by their family”. This is the widely-known mechanism of Continuing Benefit [Benefício de Prestação Continuada]. The change is considerable, involving, in political terms, a kind of solidarity pact and, in economic terms, the assertion of the state’s redistributive role, regardless of individual pecuniary contribution.

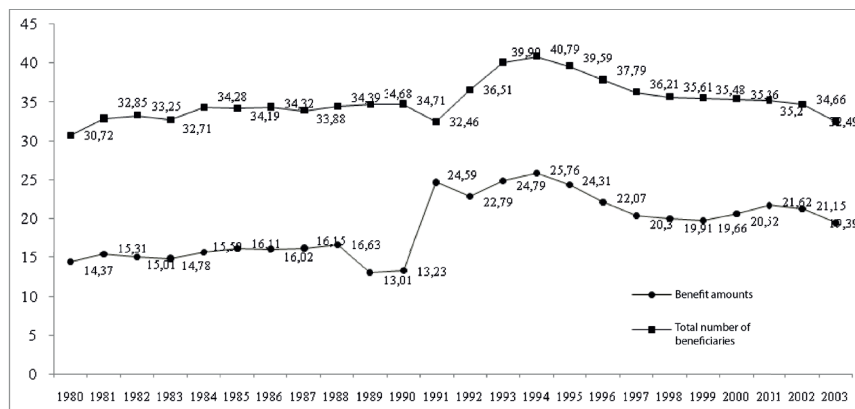


Figure 7 - Rural retirement participation in benefit amounts and in the total number of beneficiaries, from 1980 to 2003*Excluding other benefits, e.g. those granted for illness, reclusion, accidents, maternity salary, etc.

Source: Brasil (2011a).

Parameters	Complementary Law No. 11/1971	1988 Federal Constitution
Age	65 years	60 years for men and 55 years for women
Value of Benefit	50% of minimum wage	One minimum wage payment
Beneficiary	Family leader or provider	Family nucleus, no gender distinction

Figure 8 - Summary of changes to Brazil's rural welfare

Source: Brasil (1971b, 1988).

The age reduction for rural retirement eligibility, combined with its extension to all family members and the ceiling of one minimum wage payment, explain the steep curve of rural retirement participation since 1991, both with regard to the total number of beneficiaries and to the amounts granted. From 1991 to 1992, 904,361 people were incorporated as rural retirement beneficiaries, including pensioners. Between 1992 and 1993, this number increased to 1,040,921. In 1980, rural retirement stood for 30.72% of the total sum of social welfare benefits, amounting to 2,391,253 beneficiaries; in 1994 it increased to 40.79%, amounting to 6,426,147 beneficiaries, the highest rate in the historical series analyzed. Since then, in hundreds of thousands of small and medium-sized rural properties across the country, both men and women have retired with the ceiling benefit, which has had considerable impact on reducing old-age poverty in the countryside and in capitalizing small rural properties.

Reduction in rural poverty has also brought forth credit and financing policies as well as the expansion of infrastructure, e.g. electricity, all of which have enabled the increase in consumption of durable goods. In 1996, 39% of rural houses had electricity, a number which reached 68.1% ten years later. In 2009, 85.1% of rural houses had television sets, 54.8% had telephones, and 97.23% had cookers. According to data presented by the 2006 Agricultural and Cattle-Raising Census (Brasil, 2006), 84% of rural establishments in Brazil were small properties, with an average area of 18.37 hectares. Family farming involved 12.3 million people in 2006, responsible for the production of 87% of cassava, 70% of beans, 46% of corn, 38% of coffee, 34% of rice, and 16% of soybean. In view of the data, it is hard to deny that family farming is one of the most productive sectors in contemporary Brazilian economy.

In 2010, 15.6% of the country's population, or 29,830,007 people, still lived in rural areas (Brasil, 2010). Even if one considers the various

regional and ecological contexts nationwide and the persistent presence of large estates, Brazil's countryside remains a densely populated space. When municipal arrangements made up of small cities, villages, and other populational settlements classified as urban are taken into account, what comes through is the territorial capillarity of rural retirement benefits. If rural retirement was once an effective policy in the fight against poverty, it has now become paramount in capitalizing municipal economies.

Capitalization at municipal level

The map designed by the United Nations Development Programme (*UNDP*) showing the evolution of development categories at municipal level and in the years 1991, 2000, and 2010 reveals significant changes in Brazil's poverty and inequality rates. In 1991, 85.8% of Brazilian cities were grouped in the low municipal development category, compared with 41.8% in 2000 and 0.6% in 2010. In 2010, the medium municipal development category included 40.1% of Brazilian cities, surpassing by far the 0.8% registered in the same category in 1991. A study by the Institute for Applied Economic Research [Instituto de Pesquisa Econômica Aplicada – IPEA] (2012) confirms these changes in municipal development and includes the rise of minimum wages and inflation control among the reasons behind such advancements. The study ranks income contributions derived from work (58%), social welfare (19%), Bolsa Família programme (13%), and the continuing benefit (4%) as crucial elements in poverty reduction.

To assess the impact of rural welfare on municipal economy, first it is necessary to understand how the latter operates. It may be defined by actions performed by the state and the market as well as by the relation between them in a given city. Market dynamics is partly responsible for income and for job creation, whether formal or informal, and it is inscribed in a set of economic activities that, in turn, generate taxes. The market's greater or lesser influence on municipal economy depends on several factors, the most important of which is the municipal productive profile. Therefore, the number of formal jobs in the transformation industry, for instance, is proportionally greater in cities with industrial parks or even in lowly-populated cities that house large companies linked to the mineral and/or food sectors, which centralize the offer of formal

jobs. With regard to the state's actions in a municipal economy, the local executive's role must be highlighted here, both in providing jobs in the public administration – which has gained growing importance in cities with less than 20,000 people – and in dispersing investments in infrastructure and/or services. The municipal executive, whose income relies on state and federal transfers as well as on its own revenue, is a vital agent in generating municipal income. The state's scope of action also includes direct transfers to citizens, a growingly important factor for municipal economies. According to a study by França (2011), in 2010, in 3,875 Brazilian cities (69.6%), social welfare benefits exceeded transfers from the Municipalities' Participation Fund [Fundo de Participação dos Municípios – FPM]. Direct income transfers to citizens include the Bolsa Família programme, continuing benefits, and, of special interest to the present study, rural retirement.

The choice of rural retirement for an assessment of the impacts on municipal economy is justified by four particular aspects. The first is age range, given that this study specifically addresses capitalization in families with elderly members, many of whom enjoy financial leadership. A large number of elderly citizens has, in fact, become family providers. The second aspect is rural spatiality, in that working in the country is a basic requirement for receiving retirement benefits. The third aspect is cities' demographic profile, in that greater importance should be given to the number and value of benefits within lower populational classes. The fourth aspect is political, given that beneficiaries' lack of pecuniary contribution over the course of their labour period makes rural retirement a constant topic among sectors that claim the existence of a welfare deficit.

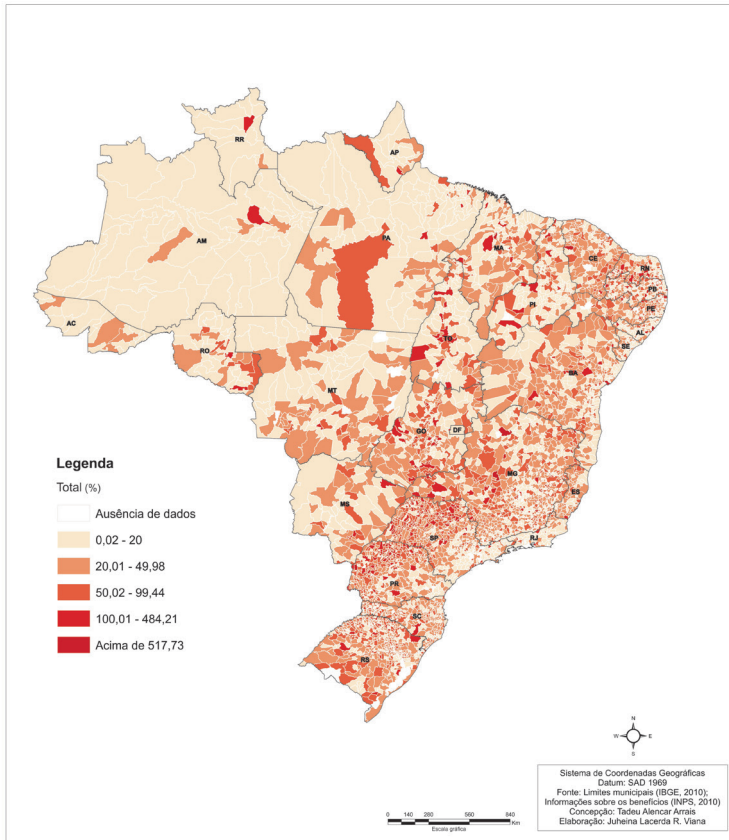


Figure 9 - Participation of rural benefits in relation to the total rural population, in 2010

Source: Brasil (2010).

Figure 9 relates the total amount of rural retirement benefits with the number of country residents over 60. The reason the analytical series starts in 2010 is due to the availability of data regarding the rural population (Brasil, 2010). This initial scenario at state level is impressive. In 2010, there were 4,809,976 people over 60 living in the Brazilian countryside and 8,651,599 rural benefits. The total number of rural benefits was 179.86% higher than the number of rural residents over 60 – even though this rate did not account for the fact that country women retire at 55. Findings reveal a movement known as migration of rural

retirees to urban areas, triggered by three main reasons: 1) reduced ability to perform rural activities; 2) access to essential services in nearby urban centres; 3) expansion of the sociability range in cities or small villages and settlements, combined with the need to care for other family members.

In the Federal District, the percentage of rural benefits in relation to the entire rural population reached 545.23%, which can be explained by the migration of retirees from the country to nearby cities or to cities in other states. According to Valadares & Galiza (2016), the average duration of age retirement in urban settings in 2013 was 13.1 years for men and 18 years for women. In the country it was set at 17 years for both men and women. Retirement expectations play a role on distinguishing between rural and urban benefits. The second gradient in Figure 9 shows a composition involving the North and the North-East, with the exception of Paraná state. All states have registered a participation of over 55.53% in the total number of rural benefits granted to the rural elderly. Considering the absolute number of rural retirements, states with the highest concentrations were Bahia, Minas Gerais, Ceará, Rio Grande do Sul, and Maranhão; together they produced 2,819,695 rural benefits in 2010, or 32.59% of all rural retirement benefits nationwide. One must not forget that 89% of the 5,565 Brazilian cities had a population of less than 50,000 in 2010, while in the North-East the rate reached 90.46%. In 2010 there were 4,510 villages, home to 15,834,261 people. The Brazil depicted by the rural retirement scenario is, in a broad sense, extensive from a geographical standpoint and capillary when one considers the network of small cities, linked to rural and regional spaces. Understanding this issue is crucial for reflecting on the consumption inscribed in the social landscape of rural retirement.

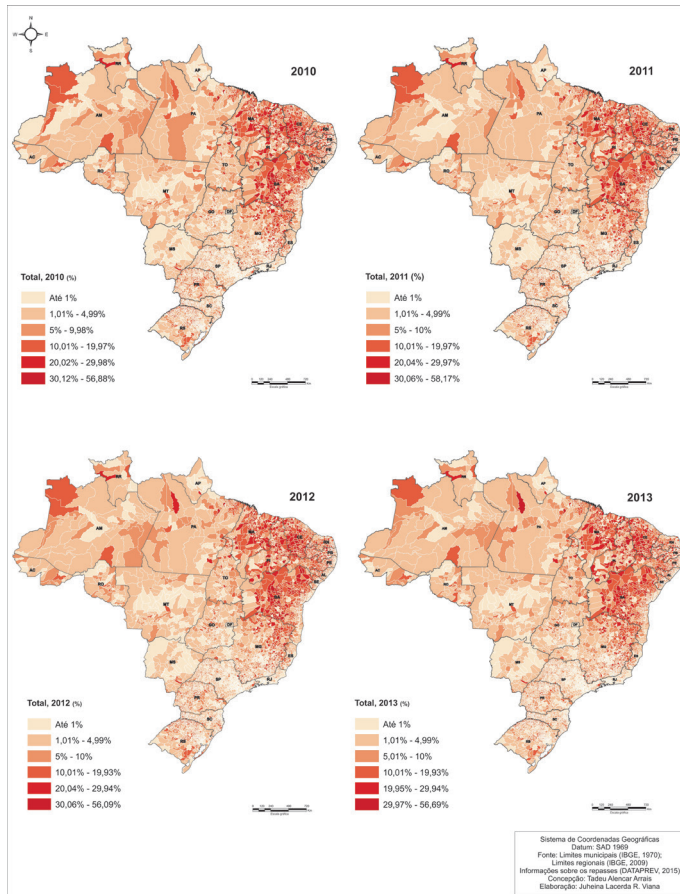


Figure 10 - Participation of rural retirement values in the municipal gross domestic product

Source: Brasil (2011b).

Figure 10 shows the participation of rural retirement in the municipal gross domestic product (GDP).⁸ The short time interval shown reveals the maintenance of regional patterns as far as the relative participation of rural retirement in the municipal GDP is concerned, with cities from the North-East showing greater relative participation. Rural retirement accounted for 1.29% of the national GDP in 2010, 1.24% in 2011, 1.32% in 2012, and 1.33% in 2013. An interesting factor, however, lies in the change of relative participation at municipal level, a space in

which asymmetries are more easily conveyed. The participation of cities with less than 1% of rural retirement representativeness in relation to the municipal GDP reached 18.39% in 2010 and 16.96% in 2013. These rates accounted for 1,015 and 936 cities in 2010 and 2013, respectively.

The regional economic and demographic scenarios of this participation may be roughly divided into two groups. The first group includes state capitals and cities that make up metropolitan environments. The combination of high GDP and low rural retirement rates explains this group's timid participation. In 2013, rural retirement participation in relation to GDP totalled 0.04% in the city of São Paulo, 0.02% in Rio de Janeiro, and 0.07% in Recife. Teresina, with 1.46%, was the only state capital whose participation was higher than 1%. The second group reveals a different demographic pattern, with an economy grounded on a specific and more vertical sector, such as agriculture, services or even mining, determining municipal revenue. This group includes cities like Chapadão do Céu, in south-east Goiás, with a 0.10% participation, or even Bertioga, a coastal city in São Paulo state, with 0.06%. In other cities, such as Santos, Campinas, and Caetano do Sul, in São Paulo state, as well as Niterói and Volta Redonda, in Rio de Janeiro state, rural retirement participation in the municipal GDP was less than 0.07% in 2013. The weight of municipal GDP produced by industrial activities or even the services sector makes rural retirement costs proportionally less significant. The highest participation range went from 1.01% to 4.99%. This was the range of 36.28% and 36.55% of Brazilian cities in 2010 and 2013, respectively, which amounted to 2,002 and 2,017 cities.

The group with the highest participation, i.e. in which rural retirement had the greatest influence on municipal economy, registered over 20% of representativeness. In 2010, this group accounted for 7.59% of Brazilian cities (424 cities); in 2013, this rate increased to 7.72% (430 cities). The highest participation rates, ranging from 30.08% to 56.09%, were registered in cities from Piauí, Bahia, and Ceará states. In Paulistana, Amarante, Valência do Piauí, and Itaueira, all in Piauí, as well as in Condeúba and Barra dos Mendes, in Bahia, rural retirement participation in the municipal GDP was higher than 46.42%. These cities have in common an economy based on lowly-capitalized agriculture and cattle-raising, in addition to a demographic profile of less than 25,000 people. Of the ninety cities with the highest rural retirement participation in the

municipal GDP, only four are not located in the North-East. The 29 cities in Bahia, 18 in Piauí, and 14 in Ceará that fall into this category expose the unmistakable regional profile of rural benefits.

Municipal GDP may be defined as a summary of a city's current economic standing, given that it covers elements of production (goods and services), including consumption expenses and income. In this sense, rural retirement participation is relevant in a considerable number of Brazilian cities. In 2013, rural retirement participation was over 10% in 1,328 cities. This finding seems extraordinary, especially when one considers that such resources are intended for local consumption, hence indicating a strategic dependence on income distribution through this channel.

Populational group	Total number of cities	Population in 2015	Granted benefits*			Benefit amounts**		
			Total	Rural	%	Total	Rural	%
Up to 3,000	456	1,060,826	206,764	123,459	59.7	2,224,515,949	1,178,922,506	52.99
3,007 to 5,000	786	3,132,369	592,228	351,192	59.3	6,198,588,302	3,299,843,957	53.23
5,003 to 9,995	1,214	8,603,321	1,466,344	855,993	58.4	15,437,567,554	8,048,223,626	52.13
10,011 to 19,997	1,375	19,621,141	3,652,249	2,080,150	57	38,676,897,043	19,273,132,309	49.83
20,012 to 49,991	1,093	33,111,981	6,069,388	3,094,612	51	64,924,913,836	28,309,184,179	43.6
50,105 to 99,863	353	24,327,441	4,154,882	1,506,446	36.3	47,811,837,481	13,713,679,712	28.68
100,243 to 496,696	265	53,423,237	7,671,492	1,022,885	13.3	105,101,006,324	9,421,398,824	8.96
502,748 to 882,729	26	16,295,055	2,309,529	143,095	6.19	33,350,745,690	1,323,886,817	3.96
1,013,773 to 11,967,828	19	44,890,118	6,578,686	168,532	2.56	108,159,554,376	1,587,599,961	1.46
Total	5,587	204,465,489	32,701,562	9,346,364	28.6	421,885,626,555	86,155,871,891	20.42

Figure 11 - Total number and amount of rural benefits granted in 2015 per municipal populational group

* In December 2015.

** Cumulative amount in 2015.

Source: Previdência Social (2015); Brasil (2015).

Figure 11 shows the capillarity of rural benefits considering populational groups, total number of retirees, and rural and urban benefit sums in 2015. In the populational group of up to 49,991 people, rural benefits are, on average, over 50% higher in relation to the total sum of urban benefits. This group concentrated 65,529,368 people, a finding which reveals intense income pulverization. As for the group of up to 9,995 people, the total amount of rural benefits was higher than that of urban benefits. This group covered 12,796,516 people. The difference in proportional participation between the number of beneficiaries and the amounts granted is directly related to the rural retirement ceiling, which is of one minimum wage payment and, on average, lower than the urban retirement amount. In 2015, 3,558 cities had higher rural benefit rates than urban ones, not considering municipal populational groups. On the other demographic end, in groups with 100,243–496,696, 502,748–882,729, and 1,013,773–11,967,828 people, rural benefit rates fell 8.9%, 3.9%, and 1.4%, respectively, compared to urban ones. This does not mean that rural benefits are not relevant, but that the prominence of formal urban work, especially in agglomeration economies, boosts the participation of urban benefits, whether regarding the amount invested or the absolute number. In Maranhão, Piauí, Tocantins, and Rondônia, rural benefit amounts were, on average, 50% higher than urban ones; in Ceará, Paraíba, Pará, Bahia, Rio Grande do Norte, and Roraima, rural benefits were, on average, over 40%. A total sum of R\$48,916,197,656 was transferred to these ten states in 2015, whereas São Paulo and Rio de Janeiro, states with lower proportional participation, received transfers totalling R\$5,289,924,017 and R\$702,040,055, respectively.

Cities of up to 9,995 people, i.e. urban settlements with predominantly rural features, were given R\$12,526,990,089, a sum responsible for boosting the municipal retail sector. In broad terms, the monthly income produced by rural retirement is used for two purposes. The first is the maintenance of small rural properties, for many of which this is the only regular source of monetary income, one which does not rely, for instance, on cattle sales or even on farming. Several rural establishments and houses have more than one beneficiary, which entails two minimum wage payments every month in lowly-capitalized small properties. Therefore, expenses from hiring workforce to open up pastures, fuels for motive power, salt for cattle, electricity bills, tools, light

machinery, and household items all make up the spending spectrum of those popularly known as “rural retirees”. The second purpose is urban domestic consumption, which includes the purchase of medicines and durable/non-durable goods for the elderly and their families living in cities, villages, and settlements. From a share of daily food expenses to the purchase of durable white goods, retirees and their calloused hands are usually involved. It is not by chance that retailers have discovered solvency in small cities thanks to the mediation of the elderly, as is the case of famous retailer *Armazéns Paraíba*, a major presence in rural areas of the North-East. With regard once again to expense dynamics, Schwarzer (2000, p. 147) makes the following statement based on a study carried out in the town of Igararé-Alçu, in Pará: “Almost two thirds of those interviewed (21 individuals) claimed that medicines, special food items, and specific medical treatments not available in the (modest) local health service take up a significant share of their domestic budget”.

Albuquerque, Lobo & Raymundo (1999, p. 8) assessed psychosocial traits of rural retirees, addressing topics such as social integration and autonomy resulting from regular income.

The benefits of retirement have provided rural families which include an elderly person a stability and minimum economic credibility that have changed the entire frame of established relations, both from the perspective of the families themselves and from a social perspective, given that commercial relations underwent changes. As regards family relationships, in view of the fact that the retiree provides regular income, his/her family, children, daughters-in-law, and grandchildren tend to accept him/her more easily; instead of being a burden, an expense, now the retiree is often the only guarantee of regular income for the purchase of food. It is quite common to hear from families that the presence of an elderly person is good because it ensures the market basket is provided.

The total amount, combined with the dispersion of rural retirement resources, indicates the functionality of such a welfare policy for municipal economies. It is not by chance that transactions on the “street” – a generic name for “city” in many parts of Brazil’s country areas – is more intense on the days of rural retirement payments. From this perspective, Brazil, with its continental dimensions, can no longer be considered only a country of metropolitan arrangements. Even in the case of urban settings, one must bear in mind that the means of gauging the urban

phenomenon disregards the intense relations between rural and urban spaces now mediated by consumption, a result of the income provided by rural retirement, by the Bolsa Família programme, and by continuing benefits. Under the prerogative of social welfare, income inclusion has significantly changed the Brazilian countryside and, hence, the territory as a whole. One must understand that the integration of rural spaces with urban and regional ones grounded on consumption echoes the integration of the national economy. From the standpoint of the classical division of labour, the Brazilian countryside is no longer viewed only as a space of primary surplus production and cumulative poverty. To a considerable extent, this is due to the gradual incorporation of the elderly population into the rural retirement regime.

Conclusion

Castel (2015) argues that the new social question must be considered from the perspective of two phenomena: the first refers to labour deregulation, while the second is linked to the disintegration of social protection networks. Castel's concerns are relevant, particularly in contemporary Brazil, where the welfare state is being consumed by fiscal measures. Rural retirement, from the perspective of social assistance, has greatly contributed to reducing poverty in the countryside. It is the country's most capillarized policy, whose economic impact has been described by several researchers, e.g. Delgado & Cardoso (1997) and Schwarzer (2000). In December 2015, from a total of 32,701,562 social welfare benefits, 9,346,364 (28%) were granted to rural residents. As far as amounts are concerned, R\$335,735,754,665 were granted in the form of urban benefits and R\$86,149,871,890 of rural benefits. The 100 cities with the highest participation in urban benefits concentrated 56% of the national total sum, whereas the 100 cities with the highest participation in rural benefits concentrated only 13% of the national total sum, which reveals greater pulverization of this group's benefits. Such phenomenon is more relevant in cities with less than 20,000 people, reduced participation in formal employment, and a small, lowly-capitalized – though productive – agriculture. Solvency of elderly people has resonated in municipal economies, both in rural areas and in small cities, villages, and settlements. This is an economic finding that should not be overlooked.

If the debate on rural retirement is located only within the fiscal issue, grounded on a balance between pecuniary contribution over the course of labour activities and access to benefits, it will neglect the fact that we are dealing with the historic social question, as Valadares & Galiza (2016) have suggested. In 2013, total expenses with social welfare took up 6.49% of the Brazilian GDP. On its own, rural retirement amounted only to 1.33% of the GDP. Considering the Union's general budget for 2015, rural retirement was second only to Bolsa Família in terms of greater outreach and lower costs – the latter amounted to 0.92% of the federal budget, benefitting 19,936,791 families and 47,146,438 people with a total sum of R\$27,650,301,339 (Data-Social, 2016). Rural retirement granted benefits to 9,346,364 families with a total sum of R\$86,149,871,890 in 2015, taking up 2.8% of the federal budget. Interestingly both programmes, unequivocally tied to the social question, reveal distinct spatialities: Bolsa Família, for instance, comes forth as predominantly urban, as suggested by Arrais (2016). Both programmes are therefore complementary, forming, together with continuing welfare benefits, the triad of Brazilian social assistance.

Political motivation was in place when rural retirement was promoted to the list of fundamental social rights in the 1988 Constitution. Whether in the institutional political arena or in small rural properties, there is a dense history of conflicts surrounding the inclusion of the rural elderly population into the state's social protection system. By taking up this role, the welfare state placed the question of social cohesion at the heart of its political agenda, both in the country and in the cities.

Income redistribution via social policy, in turn, echoed positively in municipal economy. Integrating rural and urban economies through the rise of income and consumption among the elderly population shows that any changes to rural welfare policy must be assessed with caution, given that this is the most capillarized social policy of the Brazilian countryside. The old fiscal-oriented vocabulary, employed by Constitutional Amendment Proposal No. 287, punishes Brazil's social welfare in general and rural welfare and continuing benefits in particular (Arrais, 2017). Social expense is viewed as conspicuous, while tax reductions and interest payments are seen as a growth strategy. The mere expansion of rural retirement benefits in the 1990s would not have been sufficient to reduce old-age poverty in the countryside. Expanding benefits would have little effect if it were not for their association with the minimum wage, which registered an exceptional rise in purchasing power

over the last decade. Cumulative minimum wage adjustment from 2004 to 2015 reached 125.45%, compared to 72.34% of cumulative inflation (MTPS, 2015; BCB, 2016).

In short, rural welfare has become at once a policy against poverty, especially that affecting the elderly population, and a major channel of income distribution for municipal economies. This cannot be overlooked, and every effort to ensure the visibility of this debate will converge with the effort to uphold the welfare state.

Note

1 This article stems from the project “Transferência de renda direta e economia urbana: análise dos impactos da Aposentadoria Rural e do Bolsa Família nos municípios goianos” [“Direct income transfer and urban economy: an analysis of the impacts of rural retirement and the Bolsa Família programme on cities in Goiás state”], financed by CNPq.

2 This debate involves different concepts of state. The greater or lesser extent of state intervention, whether on infrastructure, services and/or social assistance, has a direct relation with general notions of state. For more on this debate, see Friedman (1977), Polanyi (2000), Harvey (2008), Silva (2013), and Piketty (2014).

3 The book *O Estado do Bem Estar-Social na idade da razão* [“The Welfare State in the Age of Reason”], by Celia Lessa Kerstenetzky (2012), offers an excellent discussion on the welfare state’s political trajectory.

4 Brazil’s welfare state is grounded on three regimes. The general regime, the focus of this article due to the fact that it includes rural welfare, has its policies centralized by the Ministry of Social Welfare, as is determined by Article 201 of the Federal Constitution (Brasil, 1988). The other two regimes are linked to civil servants and to complementary welfare services.

5 The PhD thesis *A política fiscal e a falsa crise da seguridade social brasileira* [“Fiscal Policy and the False Crisis of Brazilian Social Security”], by Denise Lobato Gentil (2006), is a good antidote for challenging the deficit discourse.

6 Article 2: “The INPS is an entity in the Union’s indirect administration, has legal autonomous personality, and enjoys in full the Union’s prerogatives, privileges and immunities, even with regard to its own assets, services, and actions” (Brasil, 1966, my translation).

7 Social welfare is viewed by urban workers as a pecuniary contributive insurance, resulting from equations that associate contribution time and service time. As far as rural workers are concerned, difficulties in formalizing employment as well as the nature of rural activities led to few benefits being granted for contribution time. Article 15 of the 1971 Complementary Law thus refers to the contribution regime: “Resources to support the Rural Workers Assistance Programme will stem from the following sources: I – a 2% (two per cent) contribution due by the producer over the commercial value of rural products, and claimed: a) by the purchaser, consignee or association that remains

subordinated, for this purpose, to all the producer's obligations; b) by the producer, when he himself industrializes his products [or] sells them in retail, directly to the customer or to a purchaser residing abroad; II – the contribution referred to by Article 3 of Decree-Law No. 1,146, passed on December 31, 1970, which is to be raised to 2.6% (two point six per cent), 2.4% (two point four per cent) being due to the FUNRURAL" (Brasil, 1971b, my translation).

8 "Total amount of goods and services produced by resident productive units that are destined for final consumption, being, therefore, equivalent to the sum of values added by the various economic activities including taxes, net of subsidies, on products. Gross domestic product is also equivalent to the sum of final consumption of goods and services valued at market price, as well as to the sum of primary income. It may, therefore, be expressed through three perspectives: a) production – gross domestic product is equal to the gross value of production at basic prices, minus intermediary consumption at consumer prices, plus taxes, net of subsidies, on products; b) expense – gross domestic product is equal to families' consumption expense plus government consumption, plus the consumption of non-profit organizations at the service of families (final consumption), plus gross fixed capital formation, plus stock variation, plus exports of goods and services, minus imports of goods and services; c) income – gross domestic product is equal to employees' income, plus the total amount of taxes, net of subsidies, on production and import, plus gross mixed income, plus gross operating surplus" (Brasil, IBGE, 2011, my translation).

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