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The Bolsonaro Government's 2019 pension reform in Brazil: a policy discourse analysis

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ABSTRACT

In 2019, the Brazilian Government secured support to pass radical reforms to the state pension system. Drawing on concepts from historical materialist policy analysis and critical discourse analysis, this paper contributes to understanding how the Bolsonaro Government utilized narratives of inter- and intra-class and generational (in)equity to problematize constitutional guarantees of social and economic rights and warrant fiscal austerity and curtailment of social protections. We contend that the 2019 pension reform can be understood as a complementary *political project* to the preceding Temer Government's labor market reforms and successful passing of legislation to place a ceiling on Federal expenditure to constrain pro-welfare politics. Our analysis adds to understanding of how policy discourse legitimated a transformation in Brazilian social policy commensurate with advancing a conservative austere-liberal market *hegemony project*.

Introduction

In 2019, Brazil's Conservative-liberal populist Government of President Jair Bolsonaro secured the support[1] to pass radical reforms to the state pension system that revise retirement ages upward, alter the contributions required for securing a full pension and revise the value of pension benefits targeted at poorer older people. The Government presented reform as necessary to put the system on a sustainable financial footing amidst an aging society and to mitigate inequities arising from divisions between relatively secure workers and those in peripheral and informal work (PEC 06/19). The pension reform proposals followed changes to Brazilian labor legislation to curtail trade union power (Vogeler, 2019), the propagation of a pro-austerity discourse by Brazilian think tanks (Ladi et al, 2018) and a populist turn in which welfare retrenchment was foregrounded and liberalization promoted (Heller 2020, 597). Our analysis adds to this body of work on the changing nature of the Brazilian welfare state and the role of discourse in securing hegemony (Wullweber, 2019). By employing a historical materialist policy analysis (HMPA) lens (Brand 2013, Caterina 2018b) we identify and unpack how the

proposed reforms functioned as a component 'political project' to advance a broader Conservative austere – liberal market 'hegemony project'. Emerging under Michel Temer's transitional government (Partido do Movimento Democrático Brasileiro – PMDB/2016–2018) the latter was marked by social conservatism, fiscal austerity, and market liberal economic policy preferences (Heller 2020, Azevedo and Robertson 2021). The intention being, we contend, to displace the inclusive market liberalism of the preceding center left Partido dos Trabalhadores (PT) led Governments, dis-embed commitments to the universalist model of social security enshrined in the 1988 Federal Constitution (CF-88) and thereby transform the state (Lavinas, 2021, 328).

To understand how pension reform proposals were articulated, rationalized, and 'sold', and which actors supported, or opposed the reforms and on what grounds, we use critical policy discourse analysis techniques (Hyatt 2013b, Hyatt 2013a) to unpack the reform proposal text and supporting publicity targeted at the broader public. In bringing together HMPA and CPDA we provide a means to empirically ground analysis in the expressed position of the Government. In doing so, we reveal how narratives of class and generational (in) equalities, market inequities and inflexible social hierarchies, were harnessed to warrant fiscal restraint, curtailment of social protections and expansion of market mediated policy, and indicate the constellation of actors supportive of this trajectory.

Towards a Historical Materialist policy discourse analysis

During the last decade, scholars have sought to rejuvenate a materialist approach to social and public policy under the rubric of Historical Materialist Policy Analysis (HMPA). HMPA is concerned with the 'correspondence' between institutions, policy paradigms and organizational practices, and the production and reproduction of capitalist social relations. The former is contoured by the material conditions of (re)production and its attendant conflict between social forces, as outcomes of conflict become encoded in the state apparatus and societal expectations (Brand 2013, Kannankulam and Georgi, 2014). Brand (2013, 427) refers to this as the 'structured context and corridors of policymaking'. The terminology of 'corridors' calls to mind historical institutionalist notions of how embedded rules, regulations, ideas, shape programs and work to foster and/or constrain particular policy action (Leubolt, 2014, 311; Peters et al, 2005). Such temporal sedimentation of ideas, discourses, organizations, and institutional practices reflects the preferences and (perceived) interests of actors as they seek to impose a political and policy reality more, or less favorable to different (coalitions of) social forces (Kannankulam and Georgi, 2014, Paul and Haddad, 2015, Gallas et al, 2011).

Problem identification, interpretation, and policy responses to improve, or shore up facets of the organization of (re)production remain contingent. Subject to contestation as actors seek to advance their preferred reforms and reconfigure correspondence between policies, institutions, and the power of opponents. In common with proponents of HMPA (Caterina 2018b, Caterina 2018a), we regard specific social policy reforms as 'political projects' linked to broader aims, ideas, and movements (coalitions) of actors, which variously seek to buttress, challenge, displace existing ideas, discourse and practices. Where multiple complementary political projects are advanced by a coalition of social forces and successfully cohere as a distinct package of ideas, preferences and material reforms favored, we speak of a hegemony project (Caterina 2018a, 215).

The aim being to advance along multiple fronts and forge a new 'common sense' interpretation of a social issue that is in keeping with the preferences of a particular politico-economic coalition of actors (Hegemony) and which disfavors alternative and subordinated coalitions (Kannankulam and Georgi, 2014; Figure 1). Political projects are used to refer to the pursuit of specific policy reforms that (re)configure the environment so that it is conducive to the embedding and (re)production of a given hegemony project. Interrogation of 'political projects' therefore provides a route by which competing idea and social forces can be examined as they struggle to secure hegemony. In this sense, much policy reform can be understood as a political project and we would not demur from this given that a whether policy buttresses institutional arrangements, or advances transformative change it is often a manifestation of struggle between competing (perceived) interests in society.

To examine the co-constitution of political and hegemonic projects and hegemony, HMPA considers institutional arrangements, social forces/actors and their ideas, preferences and discourses in the evolution of policy (i.e. policy context; actors and process) (Claar 2018, Kannankulam and Georgi, 2014, Caterina 2018b). One approach to operationalizing HMPA is to employ critical discourse methods (see Caterina 2018b) to ground elaboration of the context (corridors) of policymaking in what actors themselves understand to structure their field of policy. Moreover, a critical discourse lens allows reconstruction of the content and form of communicative action of key agents of reform to reveal and explicate their expressed goals and struggle to advance (contest) policy change (its contingency). Doing so provides a means to examine who is advancing what reforms, to what ends and how this relates to broader reform proposals (i.e. is this part of a hegemony project) and the prospect for imposing a shift in the governing paradigm (Hegemony).

Informed by the potential of critical discourse methods, we draw upon Hyatt's (2013b) Critical Policy Discourse Analysis framework (CPDAF). The CPDAF has been fruitfully applied to the granular analysis of text and broader socio-political and economic context to tease out the distinctive nature of policy reform discourses

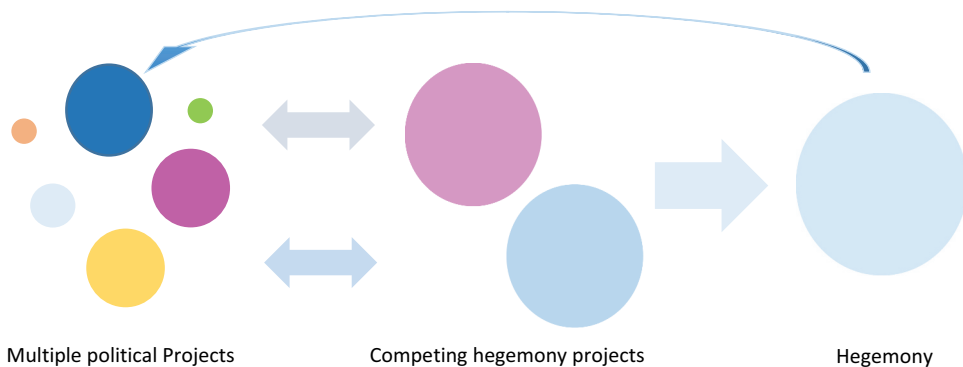**Figure 1.** Depiction of inter-related components of HMPA and the contingent struggle for hegemony. Source: Author interpretation of HMPA as elaborated in Kannankulam and Georgi (2014: 64). Note: Depiction of how political projects shape (and are shaped by) the pursuit of Hegemony projects competing to create and secure conditions conducive to their Hegemony, which then contour the emergence of new political projects.

in various sectors (Papadopoulos and O'Keeffe, 2023, Van Aswegen, 2020, Kay, 2022, Kanellopoulos, 2023, Wiggan, 2017, 2018). The CPDAF enables our paper to tease out how the discourse of a political project articulates with, and coheres a hegemonic project favored by the Bolsonaro Government and supported by (center) right parties, representative business organizations and supportive media to roll back collective and universal welfare. Here then we add to existing studies exploring the post-2016 pivot to, and support for austerity, welfare retrenchment and roll forward and/or refinement of liberal market policy preferences of succeeding Brazilian governments (Vogeler, 2019, Ladi et al, 2018, Saad-Filho & Boffo, 2021).

Hyatt's (2013a, 2013a) CPDAF is informed by the work of scholars such as Fairclough, Wodak, Cochran-Smith and Fries, Hunston and Thompson (amongst others) (Hyatt, 2013a, Hyatt 2013a, Kanellopoulos, 2023), which are conceptualized as a frame of analysis organized around 'contextualisation' and 'deconstruction' (Wiggan, 2018, 723). The first category facilitates examination of the socio-economic and institutional context co-constituting discourse and its relationship to competing social forces. The second category provides the means to identify the ways in which a social problematization and/or policy response is advanced and justified in text and the techniques used to orient the audience to assume a given issue and not another is (not) desirable/feasible. The contextualization category examines 'policy drivers' (i.e. socio-economic context for reforms); policy levers (i.e. the particular instruments favored) and whether (and in what way) particular justifications (evidentiary, accountability and political warrants) for reform are presented. An evidentiary warrant encompasses the use of some form of data to support a position, while a political warrant refers to deployment of more malleable and contestable values and concepts such as independence, community, equality. In turn, the notion of the accountability warrant seeks to capture how text may justify an action or interpretation on the basis it will lead to improvements, or avoid negative outcomes. And so, failure to act would be irresponsible (Hyatt, 2013a, Wiggan, 2017, 2018).

The deconstruction category includes the concept of modes of legitimation (authorization; moral; narrative, rationalization); the inter-textuality and inter-discursivity of the text; how the position of the author is conveyed (inscribed and evoked evaluation) and finally the construction of document content (lexico-grammatical) (Hyatt, 2013b, 840–842; Van Leeuwen, 2007, 94–105; Wiggan, 2018, 724). In brief, authorization attends to the source and type of authority embedded in a text, while moral legitimation explicates attempts to legitimate a discourse through claimed alignment of content with broader normative societal values. Not surprisingly, narrative legitimation refers to the practice of imbuing a discourse with popular ideas/myths/metaphors that help convey views and action. In contrast, rationalization aids legitimacy by articulating claimed utility (or not) of an interpretation or policy preference. Inter-textuality and inter-discursivity refer to how ideas, terminology, warrants, and claims reappear in and across texts and how a discourse may be applied to multiple interpretations and policy fields. Meanwhile, inscribed evaluation concerns how a paragraph or sentence contains explicit statements and/or claims, whereas evoked evaluation refers to how language implicitly encourages the audience to adopt one interpretation rather than another. Deconstruction may also involve analysis of the minutiae of terminology and sentence structure to understand how a text organizes, interprets, and represents an issue, or omits it (Hyatt, 2013a, Wiggan, 2017, 2018).

Methods

Not all discourses are intended for the same audience as Schmidt's (2008) conceptualization of elite-focused 'co-coordinative discourse' and public-oriented 'communicative discourse' has sought to convey. Particular genres of text will be more/less aligned to communication primarily with more specialist or elite audiences (i.e. technical scientific and policy documents) or more/less oriented to public consumption (i.e. party political broadcasts; major announcements or speeches by senior politicians). This is not to say there is no inter-relationship as media, think tanks, community organizations and interest groups, facilitate distillation, 'translation' and dissemination within and between technical experts, political elites and the public.

We purposely focus our main analysis on the Explanatory Memorandum (EM) attached to the Proposals for Amendment to the Constitution, PEC 06/2019 (Minister of Economy, 2019) from the Bolsonaro Government. The PEC 06/2019 is a standard legal text with 66 pages and contains the new text of the law, if approved, together with the transitional rules and provisions. At the end of the same document, the Explanatory Memorandum (EM) is presented, which has 24 pages and sets out the case for pension reform and the constitutional change. This text was the key document through which the Government outlined in detail the content of its reform proposals, elaborated the underlying drivers of reform and set out the rationale for the Government's preferred response. The authority of the document is given weight and legitimation by its association with a senior member of the Government – the Minister for the Economy – Paulo Guedes.

Second, we include in our analysis two government public information advertisements as examples of the 'communicative discourse' (Schmidt, 2008, 305) used to translate and promote complex policy reform to the general population. Here, we draw out and examine how themes (inter-textuality) elaborated upon in depth within the Memorandum were conveyed to the public. The first video (V1) is a 25-s piece that takes place at a popular fair, where people from different backgrounds and who follow different occupations engage in conversation. In the second video (V2), which lasts approximately 1 min, one hears a single narrator. During the narrative, people from different backgrounds are shown, in most cases with reference to certain professions such as bricklayers, doctors, soldiers, etc.

To facilitate analysis of the corpus of material we used the software DeepL for translation into English and one of the research team whose first language is Portuguese checked for accuracy. The team member transcribed the public information films and we then ran these through DeepL. The text in English was analyzed by the authors with the material manually coded into a table in Word and then reviewed by each author. The CPDAF conceptual categories (e.g. contextualisation/deconstruction) and sub-categories (e.g. policy warrants; modes of legitimation; evaluation) served as the coding framework.

Our corpus is purposely partial as the aim is to examine the inter-discursive and inter-textual articulation of warrants and legitimations of the new policy levers and trajectories contained within the official pension reform document and how the technical discussion was propagated via two public information films. We exclude analysis of debates and argumentation within congress around the reform as this was not the focus of interest. Instead, we indicate the position taken by parties within the congress by recounting votes

for and against the proposals put forward in PEC 06/2019. We then draw on texts from business and trade union federations and the media to indicate the political and social forces out with the state arranged in support of, or opposition to the proposals. These multiple sources provide a means to situate the political project to construct a new imaginary of (liberalized) pension provision with the advance of a broader conservative-austere market liberal hegemony project.

Changing policy trajectories: economic crisis and political opportunity

The PT governments between 2003 and 2016 embraced the liberalization of the economy that advanced during the late 1990s (Azevedo and Robertson 2021, Lavinas, 2021) and its accelerating financialisation. As with other modernizing center left governments this provided the PT a degree of credibility with and support of business and media (Saad-Filho and Boffo, 2021, Rojas, 2020). Echoing the tenets of what has been termed 'progressive neo-liberalism' Fraser (2017, 2020) this embrace of the market was conjoined with attempts to address discrimination and give greater recognition to the rights of Brazil's marginalized communities. To facilitate this, some of the proceeds of growth were directed toward social investment in education, health and pro-poor people minimum income benefits, alongside improvements in the minimum wage (Singer, 2015; Leubolt, 2016). According to Neri (2012), based on data from the Institute of Applied Economic Research – IPEA, poverty reduced in Brazil between 2003 and 2011, with the percentage of Brazilians below the poverty line falling from 24.4 to 10.2%. The nominal minimum wage increased by 340% between 2003 and 2016, generating a real gain of more than 59% in this period (Dieese 2023). We conceptualize the opening up of new routes to inclusion in the market economy and social investment in groups historically under supported and marginalized as an inclusive liberal hegemony project (Lavinas, 2021; Leubolt, 2015).

Following the financial crisis of 2008–2009 a turn to fiscal austerity became core to how many Governments in OECD countries sought to manage the economic fallout of the crisis. With tax receipts falling and unemployment rising, pressure on state budgets increased. After an initial flurry of emergency fiscal measures to mitigate social and economic dislocation attention and policy swiftly moved to scaling back public expenditure, to reduce deficits, lower the public debt to GDP ratio and create the space the private sector investment deemed necessary for economic growth (Blyth 2013, 2015Farnsworth and Irving 2018). Brazil was initially relatively unscathed by the financial crisis and its aftermath. Although the annual rate of GDP growth fell from 6.1% in 2007 to −0.1% in 2009 this rebounded to 7.5% for 2010 (World Bank, 2020a).

Lula's successor – President Dilma Rousseff, (2011-2016) who headed up the PT-PMDB led left-centrist coalition until her impeachment in August 2016 attempted to maintain the inclusive developmental approach initially. After re-election in 2014, however, the approach floundered amidst deteriorating economic conditions (Heller, 2020, 598; Saad-Filho and Boffo, 2021, 302–305). Annual rates of GDP growth declined from the 2010 high to 3% in 2013, and collapsed into negative territory through 2015 (−3.5%) and 2016 (−3.2%) (World Bank, 2020a). Conversely, the annual inflation rate as measured by the Consumer Price Index rose from 5% in 2010 to around 9% in 2015 and 2016. The downward trend in the unemployment rate which had been above 9% in the early

2000s bottomed out at 6.7% in 2014 before rising sharply to 11.6% in 2016 (World Bank, 2020b, 2020c). The PT led Government's emergent austerity discourse and program together with widespread perception of pervasive political corruption led to rising social disaffection (Azevedo and Robertson 2021, Saad-Filho and Boffo, 2021). Political support for the PT eroded, not least amongst a segment of the population, which had experienced improved living standards under the PT, but whose status and income remained insecure and seemingly under threat from economic disruption and competition from more marginalized citizens (see Heller 2020, Rojas, 2020). The consequence of the downturn and collapse of the PT's inclusive liberalism can be found in surveys of food insecurity, which indicate that from a low of 4.2% in 2013 the proportion of households in severe food poverty had more than doubled by 2020 (PENSSAN Network, 2021:9).

As Ladi *et al* (2018) point out the slowly building economic crisis of the first half of the decade contributed to the emergence of a 'critical juncture' in 2016 and the opening of a window of opportunity for radical policy reconfiguration. With President Dilma impeached, the Vice President and leader of the then PT's coalition partner – the PMDB – Michel Temer, ascended to the presidency as acting President at the head of a center right-liberal centrist coalition of the PMDB and PSDB (Partido da Social Democracia Brasileira) (Rojas, 2020, Saad-Filho and Boffo, 2021). The Temer Government were thoroughly committed to pushing forward and entrenching liberal market reforms and fiscal austerity via public spending cuts. In an echo of the analogy center right politicians in other countries have made the Government sought to evoke an evaluation of state borrowing and spending as functionally equivalent to household borrowing and budgeting. The then President Michel Temer commented; *'as in your house. If you are spending more in a given month, the following month you will economize to be able to balance the accounts of your house'* (Library, Presidency of the Republic, 2016).

In an indication of the new *policy trajectory* and its attendant *policy levers* in 2017 the Temer Government ushered in a suite of liberalizing and deregulatory reforms in the field of labor policy, including decentralization of collective bargaining and requiring active assent of employees to fee deductions for union membership (Vogeler, 2019, 433). Perhaps most striking was the Temer Government's announcement (TV Brasil, 2016) and enactment of a constitutional amendment in 2016 (55/2016) that placed a (semi-permanent) ceiling on Federal Government spending for the next 20 years equivalent to spending levels in 2016 uprated in line with inflation. A liberal ideational preference for limited government was transformed through the 'New Fiscal Regime' (Sátyro, 2021) into an institutional counterweight to the guarantees of social and economic rights embedded in the 1988 Federal Constitution. By limiting spending to 2016 levels plus inflation, the New Fiscal Regime' meant that spending on public services, as a proportion of GDP over time would decrease (Sátyro, 2021, 325–331).

Irrespective of economic growth, any government would potentially find their ability to redistribute through expansion of incomes supports and services obstructed. Moreover, the constitutional guarantees of universal health care, education and social security in this context transform welfare debates and resource allocation into a zero sum game. Pensions are significant in this context due to the constitutional guarantee, spending pressure associated with demographic change and a segmented labor market

where many work informally, but the historic beneficiaries and constituencies of support for the pension have been concentrated amongst formal employees. Informality in the labor market, therefore without contribution to the pension system, for example reached 41.6% of workers in the country, or more than 39 million people in 2019, with greater prevalence amongst black and brown Brazilian people (IBGE – Instituto Brasileiro de Geografia e Estatística, 2020a). In establishing a competition for resources, the austere market liberal project thereby incentivized the deepening of fissures in society along axes of difference such as, income security, religion and ethnicity, co-constituting exclusionary conservative discourse regarding the relative (un)deservingness of marginalized groups whose inclusion the PT had promoted (Heller 2020).

Not surprisingly, the approval of Constitutional Amendment 55/2016 (Sátyro, 2021, 324) generated speculation regarding the necessity of reforming the state pension system. The Temer Government duly obliged with an attempted reform in 2017 but failed to secure sufficient support for its proposals amidst a broader decline in public support for the Government. The subsequent 2018 Presidential election success of the social conservative Jair Bolsonaro re-affirmed the swing to the right in the political sphere. This gave renewed impetus to advance of a hegemony project of 'austere market liberalism' and displacement of more collective and universalist conceptions of social and economic rights (see Leubolt, 2015, Lavinas, 2021, 2017, Heller 2020).

Drawing on existing work analysing political and policy developments (Leubolt, 2015; Vogeler, 2019; Lavinas, 2021; Azevedo and Robertson, 2021; Heller, 2020; Saad-Filho and Boffo, 2021), we conceptualise this *Austere market liberal state* hegemony project as a general policy orientation to promoting a liberal market order as source of economic dynamism; the containment of social spending as necessary to raise economic growth and the use of market mechanisms & private social provision as preferable for quality, efficiency and a smaller state. The underlying problem interpretation being threefold. First, that compression of income differentials distorts incentives, undermines order and is unaffordable. Second, that state regulation weakens market signals, obstructs necessary adjustments in demand and supply. Third, spending discourages private investment through increases in public debt and taxation. Consequently, the desirable policy response includes reduction of social welfare spending; de-regulation of the labour market; curtailment of social security coverage and promotion of (individualising) private sector alternatives that exacerbate inequalities and reaffirm social stratification.

The objective being to weaken commitments to social and economic rights associated with CF-88 and the logic of an *Inclusive liberal market state* hegemony project. Successive PT led governments combining support for a competitive liberal market order with a 'pro-poor' orientation to moderate financial redistribution and equality that promoted recognition of, and respect for social diversity (Lavinas, 2021; Leubolt, 2015). A social investment like policy response (Hemerijck, 2018) of resourcing and opening up access to education and health care, together with improved cash benefits & higher minimum wages being the means to erode discrimination, buffer incomes and improve human capital as spur to market stability and expansion (Leubolt, 2015, 46; Lavinas, 2021: 338; 2017, 51; Heller, 2020).

New policy levers: liberalizing pension reform proposals

Before moving to analyze the Bolsonaro Government reform proposals, we briefly outline the pension *policy levers* and *trajectory* prior to 2019. Prior to the Federal Constitution of 1988 (CF-88) Social Security in Brazil had a corporative and fragmented character (Vianna, 2019; Kerstenetzky, 2012). Following the end of the Military Dictatorship and in the wake of the redemocratisation movement, Brasil shifted toward a redistributive universalism, as the 'Citizen Constitution' raised education, health, and social protection to universalist rights (Kerstenetzky, 2012, Clark, Corrêa, and Nascimento 2013, Bercovici and Massonetto 2006). The pension system was inserted in the list of Social Security Policies, along with Social Assistance and the Universal Health System (SUS) and under CF-88 involved a contribution-based tripartite (i.e. workers, employers, and state) system of funding that provided comprehensive coverage for workers in formal employment. The relative generosity of the pension system, though, was striated by labor force cleavages with the military, politicians, and civil servants particularly privileged (Carvalho, 2018; Kerstenetzky, 2012).

The pension system has since undergone several changes, to eligibility conditions and benefits.[2] The reform, known as the Desvinculação das Receitas da União – DRU, gave central government discretionary control over up to 30% of the resources that were constitutionally earmarked for particular areas of social spending, which reduced the resources for financing the pension system (Rossi et al, 2018). The Proposal for Constitutional Amendment 287 of 2016 (PEC 287/2016) in the Michel Temer Government was not approved, but it was a preview of the proposal of the PEC 06/2019 of the Bolsonaro Government, suggesting changes in several constitutional articles (Articles 37, 40, 109, 167, 195 and 201). These proposed changes in the scope and access to benefits such as access to pension for death, homogenization of differences for retirement between men and women and urban and rural workers and indication of a minimum age for retirement among others. The Bolsonaro Government's subordination of social protection and preference for economically liberal and austere policy was indicated early on. The Ministry of Social Security and Social Assistance was 'lowered' to the level of Secretariat, located within the Ministry of Economy, under the Minister Paulo Guedes, an economic technocrat known to favor liberal market policy approaches. The push to displace existing pension policy levers and institutionalize the points of the reform proposed by President Temer was also resurrected, but with more structural changes and rigid parametric elements.

Included within PEC 06/2019 for example was the proposed reduction/end of the employers' contribution, with the untying of the link to the minimum wage for the floor of pension benefits and with the idea of transforming the system into an individual capitalization system, with the possibility of individual's funds being managed by the private sector. PEC 06/2019 was approved in November 2019 under the title of Constitutional Amendment 103 of 2019. Although the final version more closely resembled the previous proposal of the Temer Government. In general, the reform sets a minimum retirement age of 65 for men and 62 for women, limits the social security benefit to the average of all salaries throughout the working life and delimits contribution time as 40 years for male workers and 35 years for female workers to receive full (i.e. 100%) pension benefits. Another

significant change was the limitation of the pension for death to 50% of the beneficiary's salary when the only dependent is the spouse, with an increase of 10% per dependent, but with the guarantee of the Minimum Wage as the lower limit (Dieese – Departamento Intersindical de Estatística e Estudos Socioeconômicos 2019).

As we discuss below while PEC 06/2019 was concerned with 'fairness', patterns of labor market participation and segmentation mean citizens informally employed, or periodically unemployed will now be far less likely to receive a full pension, or indeed any pension at all. For although the average life expectancy at birth of Brazilians was 76.6 years in 2019 the differences between the States of the Federation are substantial. The State of Maranhão has a life expectancy of 71.4 years while Santa Catarina has a life expectancy of 79.9 years, for example (IBGE – Instituto Brasileiro de Geografia e Estatística, 2020b). Even within large cities, the difference can be substantial, as in the city of São Paulo which has an average life expectancy at birth of 76.8 years in 2017, but the Alto Pinheiros district reaches 85.3, while the São Miguel district is only 71.2 years old (São Paulo, 2020). The carrying of the amendment succeeded though in retrenching public provision and affirming individual responsibility for income and security, implicitly encouraging those with the means to do so to look to (additional) self-provisioning through the market.

Interweaving austerity and equity in the liberal reform discourse

The reform rationale advanced by the Minister of the Economy in the Explanatory Memorandum provides an interesting example of how appeals to economy and equity were drawn together to craft the case for retrenchment and financialisation of the public pension system. At the core of the case for reform advanced in the EM is the notion that the existing pension system was unaffordable for two principal reasons, demographic change, and generosity of provision. Inscribing within the text as a (*evidentiary*) warrant for reform are projections from the Brazilian Institute of Geography and Statistics of a rise in the number of people aged 65 and over in the population from 19.2 million in 2018 to 59.2 million in 2060 (EM. nº 00029/2019: para. 26–31). As the text asserts (EM. nº 00029/2019: para 24) many countries are experiencing an aging of the population and indeed the age dependency ratio in Brazil increased from 6.9 in 1988 to 13.3 in 2019 (World Bank, 2021). A demographic shift does not determine a state must adopt a particular policy lever or trajectory however. The nature of reform is always contingent and actors work to construct a credible case for and justification of their preferred policy. As Fairclough and Fairclough (2013, 337) note, political actors often strive to demonstrate that they are motivated by commendable actions, such as the public commitment to justice and so it is in the case of Brazilian pension reform. Here deleterious consequences of failing to act (i.e. an *accountability warrant*) are foregrounded in relation to economic growth alongside more/less explicit reference to intergenerational (in) equity and a (in)just allocation of resources to public services and supports besides pensions (*political warrant*).

> . . . our fiscal knot is the primary reason for the limitation of our sustainable economic growth. And this fiscal knot has a root: pension expenditure. As long as we refuse to address the pension challenge, public debt will rise relentlessly and choke the economy . (EM. nº 00029/2019: para. 06)

> The presented diagnosis shows the need to promote a bigger sustainability of the welfare system, guaranteeing the maintenance of the payment of benefits in the future and the reduction of fiscal pressure with welfare, potentially liberating resources for allocation in the scope of Social Security and in other public policies essential to the Country. Therefore, it becomes imperative the need to evaluate the adequacy of the system to the new demographic reality and promote the sustainability of the welfare system as a whole (EM. n° 00029/2019: para. 48).

As in the excerpts above, the concept of (un)sustainable/sustainability is threaded throughout the EM. The deployment here of 'sustainability' provides an *inscribed evaluation* of the existing pension system *and* provides the audience with a depiction of the undesirable future trajectory for social welfare and the Brazilian economy if desired reforms are not passed (*evoked evaluation*). Situated alongside the *evidentiary warrant* of population aging the repeated allusion to sustainability destabilizes and problematizes the present while positioning proposed reform as de-risking future uncertainty concerning pension viability. Underpinning this is an implied articulation of the economic liberal notion of expansionary fiscal contraction (see EM. n° 00029/2019: para 38 and para. 55). That is, the claim that public spending retrenchment, rather than higher taxation, is a better means of addressing public debt on the assumption that this would foster wage moderation and reassure business that public spending levels in the present do not imply higher tax demands in the future or risk default. This allows for lower interest rates to encourage borrowing and investment and so the contraction of public spending in this understanding promotes private economic expansion and higher growth (Dellepiane-Avellaneda, 2014). Liberalizing reforms consequently become the means by which the promise of socio-economic rights, encoded in the constitution, can be realized.

> The goals outlined in the Constitution to develop the nation and fight poverty require a stable macroeconomic environment that will not come about without a new pact for Social Security. We can move from the vicious circle of more spending, more debt and more interest to a virtuous circle of sustainable spending and debt with moderate interest. (EM. n° 00029/2019: para. 8)

Anticipating that opponents might nonetheless object that losses will be unequally distributed and reinforce social divisions, there is an *inscribed evaluati*on of the reform as fair in the claim that one of the three 'pillars of reform' is 'equity' (EM. n° 00029/2019 para. 18). The other two pillars of the proposal being to combat fraud and improve collection of contributions to reduce debt that undermines the fiscal basis of the existing system. Each provides a *rational mode of legitimation* for why the established system is unsustainable, but the text also asserts that even with improvements in both areas the existing system would remain unsustainable (EM. n° 00029/2019: para. 12–18). The text omits any discussion, however, of the possibility for additional revenue raising via the tax system as part of a broader restructuring of how social security is financed. Nor does its dialog with the problems of regional, class and occupational inequity and effect on pension income in later life potentially exacerbated by the reforms.

Transition to a new system is consequently warranted and legitimated as rational and morally preferable to the established 'pay as you go' system, which is depicted as privileging higher income groups and state 'insiders' such as public servants and the

military. As higher-income insiders retain a larger share of the fund, this is seen as a cause of its cost, imbalance and long-term stability and the exacerbation and reproduction of socio-economic inequities (EM. nº 00029/2019 para. 49–54). The weaknesses in the pre-reform system and the broader inequalities of Brazilian society, where over one-quarter of pretax national income (28.4%) is held by the richest 1% of the population (United Nations Development Programme, 2020) give such a critique popular resonance. The nature of the proposed attack on privilege is though entirely in keeping with a general economic liberal critique of state protected 'insiders' and the uneconomic use of scarce resources. The advantage for proponents of liberal market policy levers is that warranting their proposals as rational and moral appeals to equity and sustainability implies opponents of liberalizing reform are less the defenders of the exploited than of insider interests, willing to tolerate exclusion, sacrifice sustainability and underfund other services to maintain their position.

> The current welfare system is marked by deep and evident inequalities. The current social security policy, to a large extent, ends up promoting intra-generational income redistribution, many times in a regressive way, leveraging the State's adverse institutional role in the reproduction or even the amplification of the already high levels of social inequality. . .. (EM. nº 00029/2019: para. 49)

> Social Security already consumes more than half the federal budget, leaving little room for education, health, infrastructure and provoking an unsustainable expansion of our debt. (EM. nº 00029/2019: para. 9)

Again, the inclusion of terms 'unsustainable' and 'debt' (*inscribed evaluation*) in the text closes the door to alternative policy responses, while implying that public spending *is* indeed a zero sum game where investment in other public services requires a retrenchment in pension provision. The public advertisements that accompanied the reforms focused on in this issue, legitimating the reform through foregrounding a form of moral evaluation, where desirability is rooted in direct appeals to fairness. We see here an example of intertextuality between the political warrant and moral mode of legitimation present in elite policy discourse and that articulated to the general public through a public information film. In each of these public information advertisements examined, the discourse includes an explicit inscribed evaluation of the relative fairness of the new system and by implication the inequities of the old system. The first advert, for example, points to how this will tackle existing privileges and that the reform will be for everyone (V1). Similarly, the second advert concludes with; '*All together, without privileges, for our future. New Pension. It's for everyone. It's better for Brazil*' (V2). The use of 'new', across the public information films works as a form of *evoked evaluation*, where seemingly neutral language is imbued with particular meaning in a given context (Hyatt, 2013a, 55). In this case, it evokes a sense of positive transformation that enables the overcoming of an unfair and deficient form of welfare spending.

The second advert, for example, precedes 'new' with directing the audience's attention to the diversity of the workforce and their contribution to society, playing on the notion that the new system will be open to all, while stating that more money will be left for 'health, education and security' (V2). Ironically, this implicitly acknowledges that to meet demands for better resourcing of public services in line with constitutionally protected social and economic rights then a constitutional amendment to pensions was required.

Moreover, the Temer Government's constitutional amendment to place a ceiling on spending ensured mutually opposing policy trajectories within the constitution could only be resolved via the dis-embedding of one or the other. The Bolsonaro government's preferred pension *policy levers* are in this sense commensurate with the liberalizing public policy ratchet established through the Temer constitutional amendment to constrain Federal government spending.

What is particularly interesting about the reform proposals is how the discourse presents these as mechanisms to enhance equity across occupations, classes, age groups and between public services. We view the Bolsonaro Government's discourse on pension reform then as an exercise in credit claiming rather than blame avoidance. That is, Bolsonaro's Minister of Economy was not simply a reluctant manager of austerity seeking to defray responsibility for retrenchment. Rather, Guedes was crafting a hegemonising counter narrative of austerity as a necessary and desirable complement to instantiating a new liberal market order that will rejuvenate the economy, the state and society to provide sustainable security. It is not surprising then the reforms received support in congress from political parties outside of those that make up the Government, or that party support split broadly along left (opponents) and right (support) partisan divides.

Congressional votes in favour of PEC 06/2019 were dominated by right, centre right and centrist parties including; Progressistas (PP), Movimento Democrático Brasileiro (MDB), Partido Trabalhista Brasileiro (PTB), Partido Social Liberal (PSL), Partido Liberal (PL), Partido Social Democrático (PSD), Partido Republicano Brasileiro (PRB), Partido da Social Democracia Brasileira (PSDB), Democratas (DEM), Patriota, Solidariedade, Podemos, Partido Republicano da Ordem Social (PROS), (PSC) Partido Social Cristão, Cidadania, Novo and Avante. Votes against were dominated by centre left and left parties including; Partido dos Trabalhadores (PT), Partido Socialista Brasileiro (PSB), Partido Democrático Trabalhista (PDT), Partido Socialismo e Liberdade (PSOL), Rede Sustentabilidade (Rede) and Partido Comunista do Brasil (PCdoB) (see Agência Câmara de Notícias, 2019; Folha de São Paulo, 2022).

In addition to parliamentary support, influential sections of the media and the main industry representative body also expressed support for the 2019 pension reforms. For example, the president of the Federation of Industries of São Paulo (FIESP), which is the most important organization representing this category in Brazil, said when the proposal was approved in the first round of Congress:

> The approval of the Social Security reform in the first round should be celebrated by all, as it is the guarantee that the country will manage to keep public accounts under control for the next decade. The risk of national financial collapse was removed . (President of Fiesp/Ciesp, Paulo Skaf - Ciesp 2019)

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We see an example of inter-discursivity here with both employer representative and the largest media organizations echoing Government's discourse of the need for sustainability and hence the rationality of reform. Throughout 2019 in

editorials and articles with 'expert opinions', texts favorable to the Reform dominated the editorials with those against the reform largely neglected, with only 19% among the specialists (Vianna, 2019). In effect, the media reproduced and reinforced the government narrative, bolstering the austere market liberal hegemony project;

> Pension reform calls for urgency: economy does not grow and unemployment rises at the same time that the reform does not advance in Congress. ('O Globo' Opinion, 04/23/19 – Acervo o Globo 2022)

> Overall, however, the distribution of inevitable sacrifices is reasonable for a country that currently allocates an excessive 13% of its total income to Social Security — a percentage that will grow and will take up growing space in education, health and other priorities if nothing is done. (Editorial Folha de S. Paulo, 7/11/19 – Folha 2019)

Broadly the left and center-left parties, trade union centrals and social movements expressed opposition to the reform proposals, noting that the changes being sought would erode worker rights and citizen protection in old age while failing to stimulate broader economic investment (see Globo 2019, Partido dos Trabalhadores, 2019, Força Sindical 2019).

> This "new Social Security" will precisely deconstruct social protection and throw old age into misery. We have no doubt that the removal of the historical rights of workers in the country is the objective of this government. (Union Centrals Joint Note, 04/12/2019)

> The Partido dos Trabalhadores understands that PEC 06/2019 is the destruction of the Social Protection System and Public Welfare in Brazil. It represents a strong attack on the social and economic rights of the Brazilian people, with the sole objective of delivering the billions in public welfare to national and international private financial groups, compromising the expectation of the future for the next generations. (PT Resolution, 03/22/19)

Such positions had relatively little purchase in the popular media and consequently we speak of the solidification of a dominant market liberal discourse coalition of political, industrial and media elites around the political project of pension reform. The articulation of which also worked to affirm and diffuse the logic of a broader 'austere liberal market' hegemony project which in turn co-constituted other austere liberal policy mechanisms of spending constraint and reduced employment protection (Vogeler, 2019).

Conclusions

Informed by a novel conjoining of the Critical Policy Discourse Analysis Frame (Hyatt, 2013a; 2013b) and Historical Materialist Policy Analysis we have examined the nature of the Bolsonaro Government's 2019 pension reform and identified this programme as a distinct political project, discursively rationalized and sold to the public as necessary and desirable in order to achieve financial sustainability and equality of treatment. In short, we have cast light on how narratives of inter and intra class and generational (in) equity, originating in market inequities and inflexible social hierarchies, were used to warrant fiscal austerity, curtailment of social protections and expansion of market mediated policy and their attendant

inequitable distributive rewards as 'common sense' and legitimate institutional practice (Vogeler, 2019, Ladi et al, 2018).

Our analysis adds to existing work on the attempts to transform aspects of the Brazilian welfare state through deconstructing the material manifestation of the universalist ideational aspirations for social and economic rights which informed the parameter of policymaking since CF 1988 (however imperfectly). The shift in policy trajectory also weakens the basis of the inclusive liberal market hegemony project of the PT as individualization and market rationality change expectations of what the state can (and should) do and the attractiveness of private provision, weakening the commonality of interests between poorer and middle-income citizens and the prospects of (re)forging a pro-welfare hegemony. We contend then that the 2019 pension reform can be understood as a means for transforming the institutional terrain of the Brazilian welfare state in support of a conservative austere market liberal Hegemony project, supported by a coalition of center-right parliamentary actors, industrialists, and media.

Notes

1. Support from at least 3/5 of the members of the Chamber of Deputies and the Senate is required (with voting in two rounds each) as the pension system as a component of social security is guaranteed by the 1988 Federal Constitution (Brasil Constituição 1988; Agência Senado, no date).
2. Successive governments have modified the pension system, but did not break with its fundamental structure. These include Constitutional Amendment 20 of 1998 (EC 20/1998) in the Fernando Henrique Cardoso/1° Government, the EC 41/2003 and the EC 47/2005 in the Lula/1° Government, the Law 12.618/2012 in the Dilma Roussef/1° Government, the Law 13.183/2015 in the Dilma Roussef/2° Government.

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