

The meaning of aging for the dependent elderly

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Abstract *Aging is a demographic phenomenon and an economic, social, political, cultural and ethical issue. The aim of this essay is to reflect on aging and the meaning of old age in the capitalist system, under the paradox that opposes profit and human needs. The investigation carried out indicates that the elderly, with loss of capacities and disabilities, have high rates of public and private negligence. This requires the implementation of specific policies for old age, due to the trend increase of a category of elderly people: the dependent. In general, policies have acted to reinforce the data collected in a survey conducted in 2019, in 6 Brazilian states and the Federal District, among a population of 446,101 elderly people, in which disregard and abuse were found, even with the advances in current Brazilian legislation. Such facts endorse the perception of devaluing images of old age and the fact of being old, making global ethics urgent from the perspective of care that rescues essential democratic values to meaningful old age.*

Key words *Aging, Elderly, Functional impairment, Dependency, Public policy*

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Introduction

This essay starts from the historical perspective of aging in Antiquity to emphasize the golden times of the Welfare State and the contemporary capitalist structural crisis that opposes profit to the satisfaction of human needs.

The sense of aging, in the ancient philosophical perspective, was not unique to peoples and civilizations. In China, the philosopher and historian Lao-Tzy¹ sees old age as the supreme moment in life, while Confucius² states that one of the most sublime forms of love is in caring for children for parents during old age. In Greece, old age was treated with contempt and dread, mainly because of the loss of strength, pleasures and senses, in contrast to the cult of the youthful and healthy body³. Aristotle treated old age as something depressing, as a condition of a worthless person, diminished and that should therefore be removed from power³. However, Socrates, in the work *The Republic*, written by Plato⁴, defends the idea that aging is not a burden on society. In Plato's Socratic dialogues, children have an obligation to care for their parents, since old age depends both on the person's character and on the conditions of healthy care that one can have in life. In deepening Plato's thinking, Cícero⁵ - weaving harsh criticisms of prejudice, disrespect and rejection of the elderly, in the work *Senectute* - defends the idea that old age cannot be seen only at the individual level, but also at what it means in social and power relations.

In the contemporary times, the theme of aging assumes one of the most prominent presence in the intellectual and political concerns of capitalist societies, not only because it constitutes a demographic phenomenon, but also because it is an economic, social, political, cultural, and ethical issue that calls into question the quality of its commitment to human rights. This is because if, on one hand, the human and population aging represents a spectacular advance in medicine and public health, combined with a new culture of respect for differences, ensured by public rights and policies, on the other hand, this advance is seen as an obstacle to economic growth. In view of this, the theme of aging, in the recent capitalist system, contains a paradox whose opposing logics, - profit and human needs - inherent to the system, need to be problematized.

To get an idea of the relevance and complexity of the aging process, under the aegis of capital, it is worth remembering Esping-Andersen and Palier⁶, when they analyze it in the most recent

phase of capitalism. Over the past century, the authors say, capitalist societies did not stop aging. However, since the second half of the twentieth century, aging has shown several characteristics that, in large part, are the result of bourgeois rationality forged in the midst of important socioeconomic events, since the end of World War II that produced economic prosperity; full male employment; universalization of social rights; and strengthening the power of unions and identity movements, among others. Therefore, contributed:

*the end of the North American nuclear monopoly; the height of communist parties in some Western European countries; the formidable recovery of the Soviet economy; the triumph of China's socialist revolution; the heroic struggle of the Vietnamese resisting French colonialism; the Japanese occupation and then the American intervention; the triumph of the Cuban revolution and the rise of decolonization processes in Africa and Asia*⁷.

The first characteristic of the worldwide longevity movement concerns the acceleration of demographic change, whose origin can be summarized up in the following equation: "few babies, long lives"⁶. This means that, if there is, as there was, a decrease in the fertility rate, there will be an increase in the proportion of elderly people in the population as a whole; and, if there is a longevity process, fueled by supporting factors, the elderly will live longer. It follows that aging goes hand in hand with the decrease of the population which at the same time represents a decline in aggregate demand and economic productivity, going against capitalist logic and ethics.

In fact, this trend has been set in quick motion almost everywhere in the world, say Esping-Andersen and Palier⁶. Southern European countries, whose fertility rate has stabilized below 1.3 children per woman, will have their population reduced to three quarters by the end of the century. Among these countries, Italy will be reduced to 12 (twelve) million inhabitants. France, which managed to maintain fertility in 2 (two) children, is the highest rate in Europe and, therefore, will only have 15% of its population reduced by the end of the century. In Europe as a whole, the fertility rate that appears to have stabilized at 1.5 will certainly not be free of pessimistic predictions about its economy⁶. For that, reasons abound. The elderly population in Europe has grown steadily. In France, for example, the increase was of three million, between 1950 and 1990, and is expected to increase by five million over the next forty years. In turn, the Inter-

national Plan of Action on Aging of the United Nations – UN⁸ informs that, worldwide, the proportion of people aged 60 and over is expected to reach, in 2050, two billion.

The second characteristic has to do, particularly, with the increase in life expectancy that comes mainly from the improvement of the health conditions of the elderly population. Thanks to these conditions, this population segment has gained, since the 1960s, ten more years of life, allowing it to live at least until the age of 80 (in the case of men) and 85 years (in the case of women). This is confirmed by the aforementioned UN Plan⁸, when it indicates that, by 2050, the number of elderly people aged 80 and over should quadruple, with one particularity: in developing countries⁸ the amount of older people will increase more than five times, over the next 50 years. A demographic transformation of this magnitude, especially in developing countries, will have consequences for each aspect of individual, community, national and international life. Note that aging also takes place in the so-called second and third worlds.

In Brazil, considered a third world country, population studies by the Brazilian Institute of Geography and Statistics – IBGE⁹, indicate that there are currently approximately 30.2 million elderly people. Life expectancy at birth is, on average, 75.4 years for men and 78.2 for women, with the fastest growing age group being 80 years and over¹⁰, confirming the general global trend.

Currently, 86.4% of the elderly population in Brazil is active, without systematic personal care. However, the remaining 13.6% have some type of dependency, due to diseases such as Alzheimer's and other types of dementia, in addition to types of dependencies of a motor, visual, auditory nature, among others. According to the World Health Organization - WHO, the term "dementia" encompasses several progressive illnesses that affect memory, other cognitive and behavioral capacities, and interfere, considerably, in the individual's ability to perform daily tasks.

For several analysts, the numerical superiority of the elderly population causes an imminent threat identified as a "shock of generations", as it implies the possibility of dominating the interests of the elderly in public decisions that depend on the vote of citizens. As they constitute the majority of the electorate, non-young voters will not only have a greater chance of participating in political activities, but will also have majority lobbies in defense of their causes, generating, on the other hand, embezzlement in investments

dedicated to children, youth and families. In other words, it is possible to establish what, in game theory, is called zero-sum game, contrary to the principle of equitable sharing. It is based on this type of reasoning that demands for reforms in the retirement and pension systems have proliferated, mainly under the aegis of the neoliberal / neoconservative ideas that, since the mid-1970s, advocate the privatization of public social policies. It should be noted that, in the midst of the structural crisis in capital, now associated with the health crisis resulting from the COVID-19 pandemic, there are those who demand social Darwinian practices that sacrifice the lives of the elderly on the altar of the market economy.

Finally, the third characteristic of the current moment coincides with the historical process of the rise of democratic conquests in the field of social citizenship, which started in the immediate second post-war period and was in effect until the mid-1970s. This is the historical phase that became known as the 30 glorious years of the welfare state and public policies won by society, guaranteed by law and guided by an ethic of solidarity. It was during this period that, as regards the elderly, retirement as a right became a legitimate social security, since, before, few workers enjoyed it as protection against poverty. Worldwide, several countries, including Brazil, experienced moments of recognition of the individual (civil and political) and social rights of the elderly, such as: respect for physical, psychological and moral integrity protected by the State and by society, including the preservation of the image, identity, autonomy, values, ideas and beliefs, spaces and personal objects; and, still, the satisfaction of social needs, in attention to the rights to life and health, in addition to autonomy of action and criticism, essential to the social participation of citizens^{11,12}. However, over the past 40 years, these democratic achievements have been demolished. As social spending on the elderly has been increasing, especially those related to the dependent segments, the tendency is to remove the role of protection from the State and socialize costs with the family and the market, inaugurating the so-called pluralism of well-being. The ethics of solidarity is giving way to privatist morality (commercial and non-commercial) and the traditional reserve of family caregivers, led by women, runs low.

It is on this background that the following reflection on aging and the meaning of old age in the capitalist system is developed.

Aging and old age in contemporary capitalist sociability

The process of aging and old age, in the current stage of capitalist development, characterized by an endless structural and systemic crisis, should not be analyzed only through the biological perspective; that is, oblivious to the economic, political, and social context and, therefore, disconnected from the world of work and from the material and immaterial conditions of production and reproduction¹³. This is because, at this historical stage, what has most moved capital as a relationship is the relentless effort to recreate favorable conditions for its appreciation, with a view to the resumption of high profit rates, corroded by the great recession that began in the late 1970s. Nevertheless, this exit from the crisis led to the triumph of the global deregulating forces of the economy and of the interclassist social pacts, constituted in the second post-war period, and, consequently, enhanced the domination of financial capital over productive industrial. Not surprisingly, in the capitalist crisis still ongoing and heightened in 2008 with the breakdown of important investment funds applied in the speculation of real estate assets, from the United States, the capitalist oligarchy opened a covert war against workers, under the mantle of economic austerity - or austericide in the words of Navarro¹⁴. Therefore, it is very pertinent to claim that:

old age must be analyzed within the capitalist system and class structure [because]: [...] the ideology of old age is fundamental to the reproduction of capitalist relations to the extent that the production of capitalist relations implies the reproduction of ideas, values, principles and doctrines [that make up] the set of representations about the final stage of human life¹⁴.

Indeed, it is in the nature of the capitalist mode of production to generate inequalities, which severely punish citizens of all life cycles, especially those belonging to the working class; or those who do not belong to the select group of super rich people, considered the oligarchy of the crisis, which has absurdly benefited from the formidable concentration of income resulting from today's social inequality. In the working class, a significant number of elderly people suffer, besides poverty, discrimination, and violence, as they are seen as a burden on society, families and the State. Governments and International Organizations, like the International Monetary Fund - IMF, conceive, stimulate, or practice counter-reform mechanisms of the Social Security system,

based on arguments, without empirical support, which blame the elderly for the expenses considered unproductive in the public sector, especially with policies that integrate social security: health, social security and social assistance. These areas are the most demanded by the elderly.

The lack of Rights Protection and Defense Network leads elderly people to face serious problems in their daily lives. And the most burdened with this situation are family members. The family is the voluntary private source of informal social services, in particular for dependent elderly people. However, this institution has also undergone decisive changes in its structure and configuration. The figure of the woman caregiver or main reproducer of the workforce in the home, who lived on the margins of the labor market, is rare; when it exists, it is at the expense of enormous sacrifices and amateurism in the treatment of the elderly.

In the families surveyed in a study carried out in the Federal District / Brazil¹⁵, most of those who sheltered elderly people in a situation of dependency were unable to pay a formal caregiver. Only 20% had a domestic worker who helped family caregivers. In Brazil, formal care is an expensive service that few families are able to afford.

Contradictions between care proposals and prejudice reproduction

The social existence of the elderly has never been peaceful, nor has it been treated well. It would be a mistake to have an illusion of an abstract and idyllic past. It is necessary to be clear that the mistreatment and vicissitudes of old age, in addition to the conflicts that finish, are old and well known, whether in the sphere of common sense, literature and, more recently, scientific investigations. In 1970, when Simone de Beauvoir published her book *The Old Age*, in it the author said that there were "two categories of old people: one extremely vast and the other reduced to a small minority that the opposition between exploiters and exploited creates"³ – emphasizing that no study should omit this cleavage. France then had 12% of its population aged 65 and over. But, until day, discrimination in the world is based on this division, including in Brazil, which currently has more than 30.5 million people aged 60 and older. Moreover, "the myths and clichés put into circulation by bourgeois thought apply to show to others", continues Beauvoir³. If old people manifest the same desires, the same feel-

ings, the same demands as young people, they are scandalized: in them, love, jealousy seems odious or ridiculous; sexuality is a disgusting and extravagant violence³.

When the elderly is rich, the images improve, since the power of the subject prevails; but few have this prerogative. “Because of their virtue or their abjection, the elderly are outside humanity”³. An emblematic case was that of Christine Lagarde, president of the International Monetary Fund (IMF), from July 2011 to November 2019, who, in one of her speeches, said that old people must accelerate their deaths because they are a very big expense for the State. This speech, given a few years ago, by a high-income elderly woman, anticipated what is the current voice in Malthusian speeches given before the dilemma of who to save from the pandemic of the new COVID-19: the young or the old? And this, undoubtedly, has to do with the utilitarian culture, typical of a capitalism that, in its destructive expansion, has found itself with its most primitive face.

As the elderly person is considered a burden that tends to increase in the public budget, disputed by both work and capital, there is no doubt that it is on this person that the highest rates of public and private negligence will fall. In this regard, recent data available are eloquent.

In Spain, in the last decades, are noted concerns and developments related to the improvement of guidance and social assistance policies to people with addiction - based on the Law 39/2006 on Promotion of Personal Autonomy and Care for Dependent Persons, known as Dependency Law – LAPAD¹⁷; the eradication of gender inequality and ill-treatment with different parliamentary protocols and initiatives; the existence of a health network specialized in Geriatrics and Gerontology and the training of specialists; or even the support of society to non-governmental organizations, such as Caritas Spain or Alzheimer Catalunya Fundación. Nevertheless, despite these concerns, the impoverishment of the elderly has not been stopped and continues to increase in the wake of the absence of material and financial resources. In addition, the Dependency Law imposes multiple bureaucratic barriers to materialize.

In Brazil, a research conducted in 2019, in six states of the Federation and in the Federal District¹⁶, with a population of 446,101 elderly people, found inconsistencies in the way of treating them, despite the advances in the current Brazilian legislation. Only a minority is receiving health care. Most do not have effective support

from public authorities. Of those surveyed, 80% have family caregivers, who are overworked, sick and with difficulties in accessing medicines for the elderly and for themselves. It was observed that there are no services available, such as Day Centers; Long-stay institutions for the elderly which meet the real demand; and neither home care nor financial assistance for the families of the elderly in a situation of dependency¹⁷.

Such findings endorse the researchers’ perception that the elderly are not part of the concerns of the Brazilian State, even when, in theory, their policies and documents say the opposite. In practice, public actions reinforce the crystallization of images that devalue old age and the fact of being old¹⁸.

Challenges ranging from laws to standards and practices

In the contemporary world, between the idea of pluralism in the provision of social welfare that accredits the privatization of service provision and informal intra-family solidarity, it is important to reaffirm the leadership of the State in the formulation of policies and practices in defense of its rights. Even because protected old age has become a fundamental and essential human right conquered and recognized in international norms that undermine national governments, mainly the signatories of supranational agreements, as is the case of Brazil.

The UN recommends, for example, through Resolution 41/91¹⁹, some principles that should guide care in the treatment of elderly people”: independence, participation, assistance, self-fulfillment and dignity. According to the third of these recommendations, the elderly person should benefit from the assistance and protection of the family and the community, in accordance with the cultural values of society; but this person must also have access to health care to maintain or acquire physical, mental and emotional well-being, preventing the incidence of disease. However, guidelines such as those cited and others, whose construction Brazil participated in and signed the final document²¹, have not been put into practice, which certainly prevents Brazilian elderly people - particularly those dependent - from having a better quality of life¹³. Despite the fact that protected old age is a process that intersects with personalized aging, the rights of the elderly evolve towards plurality and diversity but also towards homogenization and standardization, benefiting all²².

In this context, challenges of various orders that call for the understanding that dependence and long-term care go beyond the family sphere²⁰⁻²² and require public commitment are highlighted.

Diseases that cause dependence on the elderly cause behavioral changes as the disease progresses. Therefore, it is necessary for family members and caregivers to be guided to understand the mutations that occur in both the physical and cognitive aspects of the elderly.

The living environment of the elderly with their families influences the well-being of all. When domestic relations are strained, aggravated by precarious social and emotional security conditions, the attention and care of older people is hardly satisfactory and healthy. In this environment, women who traditionally stayed at home and were responsible for the care of their children, husbands, parents or in-laws are increasingly toiling in an unfavorable job market to guarantee the sustenance of the family that, most of the time, they lead.

In these families, possible help and care are often precarious due to unpreparedness and improvisation. As already mentioned, although in Brazil, the task of caregiver is included in the Brazilian Classification of Occupation, it is not yet professionally recognized and usually costs much more than working families can afford. This also affects the salaried middle class, which is forced to bear the expenses that, at the very least, embezzle their savings.

Family members who, for lack of alternative, end up choosing to care for their dependent elderly, not only lower their standard of living but postpone professional development plans, lose work and study opportunities and become inmates for a long time. In Brazil, they have nowhere to turn. All of this denounces the lack of a structured service network that, in joint action with the family and society, can provide the elderly with new life options, as recommended by WHO²⁰:

old age often involves significant changes in addition to biological losses. These changes include changes in social roles and positions, as well as the need to deal with losses in close relationships. In response, older adults tend to select fewer but more significant goals and activities, optimize their existing capabilities, through practices and new technologies, as well as compensate for the loss of some skills by finding other ways to perform tasks.

An important aggravating factor in the situation addressed and captured by the aforemen-

tioned research, in the Federal District, Brazil, are the counter-reforms operated in the area of social security, which significantly affected active salaried workers, retired and pensioners. Several elderly people surveyed resent the lowering of the monetary value of their retirement and pensions because of the increase in social security contribution rates and regret having to depend on their children to cover their expenses. Some others (65% of the elderly population), still active, have returned to the job market, although in a precarious way, to support themselves. This practice has been adopted, usually in exchange for a monthly minimum wage, with which the old people contribute, mainly, for the support of children and grandchildren.

In conclusion

The meaning of aging for the dependent elderly person is, today, as can be inferred from the exposed in this text, multiple and non-linear. Therefore, it contemplates, simultaneously, magnitudes and common miseries in the history of humanity, typical of the fundamental contradictions of contemporary sociability, which is intensified with the advance of the new right - amalgamation of neoliberalism with neoconservatism - and by obscurantism, the latter, especially in Brazil.

The paradox that served as the guiding thread for the construction of this essay contains a disjunctive that dialectically opposes the *logic of private economic profitability to the logic of human or social needs*, constituting a common denominator for all capitalist social formations, rich or poor. Thus, although there are *quantitative* differences between these social formations, worthy of attention, *qualitatively* all of them have something that is characteristic of them: the co-existence of abundance and shortage, as a structural contradiction, which will only be resolved completely with the change of the system itself that contains it¹².

This explains why, even at the time of the glorious thirty years of the Welfare State (1945-1975), the richest countries in the world had poor people and the poorest countries in the world had rich people. In view of this reality, the greatest accomplishment of the defending forces of the precedence of the satisfaction of human needs over the satisfaction of the profit needs of capital was the conquest of social rights in the wake of tenacious and prolonged struggles for labor and social security rights, since the 19th

century, which covered the elderly. According to Pierson²¹, in the 19th century, four European countries (Germany, 1889; Denmark, 1891; France, 1895; Italy, 1898), in addition to New Zealand (1898), started to legislate on pensions, integrating the team of the first generation legislator of the well-being, of which they also took part, in the first decade of the 20th century: Belgium, in 1900; Ireland and the United Kingdom in 1908; and Australia, in 1909. However, subsidies to families made up the second generation of welfare legislation; in the nineteenth century, no country addressed this issue, and it was only during the Second World War that it deserved better attention, with the exception of the United States, which, in 1935, legislated on the elderly.

In the meantime, with the debacle of social rights, hard-won, alongside the public social policies created to bring them about, the paradox becomes explicit with unimaginable rawness, after giving the impression that its contradictions were under the control of progress scientific and civilizational achievements that humanity reached and benefited from. In relation to aging, the contribution of cutting-edge science and technology for people to live longer and healthier seemed to have, as ethics, the respect for the most vital human need, which is the preservation of life, based on the conjunction of physical and mental health.

However, just as, in capitalism, the extent of opportunities for equality and freedom are not democratic, neither are life and death. And they are not because, contradictorily, to the extent that these possibilities have been enhanced in improvements and sophistications, they are concentrated in minority portions of the population. It is not by chance that there is a spectacular increase in social inequalities that are certainly the most enormous problem in the world today.

In the past 30 years, there has been an extraordinary growth of this debacle not only on the periphery of capitalism, but also in the countries of Europe, the United States and practically all over the globe. This fact allows us to say that, according to Rosanvallon²², there is a “globalization of inequalities”, which presents the following profile: in each country, inequalities, especially those of income, have increased. This reveals that, at the same time that the countries had better economic growth rates (as is the case of the BRICS members - Brazil, Russia, India, China and South Africa), internal inequalities grew and multiplied. Europe is the most emblematic case of this trend, because the increase in inequality

within it occurred after a century of its reduction, especially between the First World War and the first oil crisis, in the 1970s. And the same happened in the United States.

Therefore, it can be said that, if the 20th century was the century of the reduction of inequalities in Europe, thanks in large part to the action of the Welfare State and social rights, the 21st century has been the century of increase and multiplication of inequalities and affronts to human rights. Affronts that are expressed in the intensification of class prejudices; in racial, religious and ideological hates; in intolerance to sexual options; in the upsurge of nationalisms, chauvinism, separatism, xenophobia, moralism and criminalization of poverty²³. In view of this, there was, in Rosanvallon’s opinion, a degradation of democracy as a form of society, although as a political regime it is still proclaimed²².

This reality has increased not only the gap between poverty and wealth, or the extraordinary concentration of global wealth in a few hands - the main growth is being channeled to the richest 1% of the world population, which now holds almost 50% of the wealth in the world in the planet; but, it has also produced the divorce between political democracy and social democracy. Consequently, there has been a break in the ties between the components of the same collectivity of citizens, making prevail the conception that modern societies are mere aggregates of individuals, as announced by the former English Prime Minister Margaret Thatcher, in the 1980s: in Great Britain, she said, there is no society, but Tom, Dick and Harry.

And as each individual has been induced to succeed, to be recognized on his own merits and to appear original, the bonds of corporate identity, the trajectories and common situations that could unite him organically to the others, fray. In the same way, democratic values of collaboration and solidarity, which would be essential for meaningful old age, vanish, thus establishing the perspective of care. As defended by Boff²⁴, it is more than urgent and necessary to recover the role of ethics in all instances of life: an ethics of care, replacing the totalitarian, symmetrical, linear and homogenizing model, whether in the construction of knowledge, of the relationship with mother earth, or in the established power relations. It is essential that “care should flourish in all areas, penetrate the human atmosphere and prevail in all relationships! Care will save life, do justice to the impoverished and rescue the Earth as the homeland and motherland of all”²⁴.

Care, according to Boff^{24,25} more than a human attitude is *a priori* ontological to human beings, even before their action. Care implies the way of being and existing. Care is a relational process of co-responsibility and affective involvement with others. In this sense, “more than a technique, care is an art, a new paradigm of relationship with nature, with the Earth and with other human beings”²⁵. Therefore, care is a way of being and existing with, in and for life in all its dimensions and species. In this way, “the care of people, societies and nature will be the most appropriate and essential attitude for the new phase of the history of humanity and the Earth itself”²⁵. To this Boff calls a new global ethos or global ethics, so urgent and necessary for life and, therefore, for the healthy aging process.

Collaborations

JMB Mendonça participated actively in article production, conception, production, research, manuscript, and planning. PAP Pereira participated in the critical review, analysis of results, final writing, and manuscript approval. APC Abigail, A Yuste, and JH Ribeiro participated in the manuscript’s theoretical production.

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