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Austerity in Brazilian Public Health: The Relationship between Capital and "Empire-Form"

José Guilherme Shiraishi Abrão[1], Aquilas Mendes[1,2], Leonardo Carnut[3]

[1]Departament of Economics, Business Administration, Accounting and Actuarial Sciences, Pontifical Catholic University of São Paulo, São Paulo, Brazil
[2]School of Public Health, University of São Paulo, São Paulo, Brazil
[3]Faculty of Medicine, University of São Paulo, São Paulo, Brazil
Email: aquilasmendes@gmail.com

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Abstract

This article aims to explore the relationship between capital and the "empire-form" through the adoption of austerity as the central policy in a contemporary world in crisis, focusing on its implications for Brazil, specifically in public health. The article is structured in two parts. The first part presents the theoretical foundations of the "empire-form" category, which derives from the "value-form" based on Marx's critique of political economy. The second part discusses the economic and social impacts of austerity policies, with special attention to the Brazilian case in the public health field. Throughout the article, it is argued that austerity is more than an economic policy; it is an instrument of domination that consolidates the imperial logic of contemporary capital, while deepening the contradictions and limits of the system.

Keywords

Brazil, Public Health, Economics, Public Expenditures on Health, Budgets

1. Introduction

The contemporary world is marked by intense economic, political and social transformations that reflect the internal contradictions of the world of capital. At the center of these discussions is the "empire-form" category. This can be understood as the expression of capital (capitalist social relations) in its ceaseless quest to self-valorize or reproduce itself on a global scale, in which multilateral institutions and large corporations play crucial roles in the reproduction of capital. The "empire-form" not only transcends the limits of national sovereignty, but also redefines the role of States to ensure the interests of global capital. Within this logic, austerity policies emerge as a privileged mechanism for adjusting national economies to the demands of capital accumulation/reproduction, especially in times of capital's polycrisis. This term "polycrisis" has frequently been used by certain Marxist economists, such as Michael Roberts (2023) and William Robinson (2023), to refer to the contemporary capitalist crisis—particularly since 2007-2008. This designation captures the confluence and intertwining of various crises when analyzing the totality of the capitalist crisis: namely, the economic (inflation and depression), the ecological (climate and pandemic), and the geopolitical (war and international divisions).

By highlighting austerity, which acquires centrality in the context of the polycrisis of capital, it can be characterized by the reduction of public spending, the retraction of social policies and by transferring the costs of the crisis to the most vulnerable sectors, and has permanently been one of the hallmarks of neoliberalism, especially since the 1990s (Dweck et al., 2018). In Brazil, the adoption of austerity measures, especially since 2015, culminated in the approval of Constitutional Amendment 95 (CA-95), which froze public spending for 20 years, severely limiting social investments such as public health, education and infrastructure. Even after its repeal, in 2023, austerity continued with the institution of the "new fiscal framework" enacted by the third Lula government, which establishes that government spending cannot grow by more than 2.5% in relation to total revenue. The relationship between austerity and "empire-form" can be used to understand the dynamics of contemporary capitalism. In this sense, this article explores the relationship between capital and the "empire-form" through the adoption of austerity as the central policy in contemporary capitalism in crisis, focusing on its implications for Brazil, specifically in public health. This is a theoretical essay based on a documentary analysis of legislation, budgetary rules, and secondary literature regarding health financing in Brazil.

2. The Logical Meaning of the "Empire-Form"

The Empire-Form is an offshoot of the global capitalist organization, in which the boundaries between the economic and the political are reconfigured in favor of the logic of capital accumulation and valorization on a global scale. Structured by networks of multilateral institutions, transnational corporations and global legal norms, this form redefines the role of national States, subordinating them to the interests of global capital. In this context, austerity emerges as a central instrument for aligning peripheral economies with the demands of the expanded reproduction of capital, intensifying inequalities and weakening state sovereignty.

It is important to understand, in broader terms, that the "empire-form" stems from the "value-form", as the social form of capitalist sociability; this "value-form" being the basis on which capitalism is organized, as described by Marx (1980). It is a social relationship mediated by the exchange of commodities, in which value appears as a social abstraction. This abstraction is materialized by money, which expresses the socially necessary labor embodied in commodities. The logic of capital valorization (C-M-C'), that is, the transformation of money into more money, is the driving force of the capitalist system and establishes the basis for all subsequent social forms within capitalism (Marx, 1980).

Rubin (1928) highlights the centrality of the social form of value, the theory of the value form or "value as a form of social labor", in the development of the labor theory of value proposed by Marx (1980). Rubin (1928) considers the "value form" as the most specific and original part of the Marxist theory of "value". It is about recognizing that value is a social form that arises from the products of labor in the context of certain relations of production between people.

From this perspective, we can say that the value-form is the universal nexus that unifies all capitalist forms. With the expansion of value relations, the need arises for a political form capable of mediating social contradictions and ensuring the conditions for the reproduction of capital. In this context, the "State Form" is developed, which derives from the "value-form" and develops during its historical movement (Ávalos, Mendes, & Tavares, 2025). Ávalos (2007, 2021), highlights that "the value-form develops as an economic world, dragging with it its constitutive contradictions, which logically explode in crises, in which the need for the negative moment of value undoubtedly arises [...]", that is, the State, "[...] not only because capital is devalued, but above all because overcoming such a situation requires a capital that contradicts its essence, that is, a capital whose business is not to make a profit" (Ávalos, 2007: p. 90).

In turn, as Huwiler and Bonnet (2022) point out, the capitalist state is a "process-form" that acts to stabilize social relations and manage crises, ultimately guaranteeing the expanded reproduction of capital. From this perspective, we can say that the empire-form is a logical-historical unfolding of the "State-form" in the context of the movement of global capital. With the integration of national economies into a global market, the reproduction of capital requires coordination that goes beyond national borders, always transcending them in search of the universalization of these relations. This occurs through a network of multilateral institutions, transnational corporations and global legal norms that structure accumulation on a global scale (Mendes, 2024a).

Unlike classical imperialism, based on territorial domination, or "of one geopolitical bloc over another", the "empire-form" is a social form of universal capitalism. In concrete terms, it operates through economic and political mechanisms that align peripheral national interests with global demands, not only those of the imperialist countries, but also those of the imperialist countries themselves with the universalized total social relationship that is capital (abstract political-social domination). Thus, political domination is not necessarily of "some countries over others", but of the relationship between them that gains such autonomy that it determines them in this logic. In short: the empire does not belong to the imperialist countries; the empire belongs to the capital form (Mendes, 2023).

To reinforce this idea, Ávalos (2007) is categorical in stating that the empire of the capitalist form of civilization is not the same as ancient or medieval empires. Strictly speaking, its modus operandi is subtle, like the very form of domination that capital conceals, allowing the existence of sovereign nation-states, yet constrained by the logic of capital. In this context, it is worth highlighting that for Ávalos (2007), "empire-form" is not "imperialism." It is an expression that refers to a relationship between human beings mediated by a hierarchy among groups constituted in various territorially delimited political units. Ávalos states:

> The hierarchy between these groups is based not only on the transfer of resources, by various means, from subordinate to hegemonic units, but above all on the differentiated possibility of decision-making. While dominant states can decide, subordinate states decide, but within the framework of superior determinations (Ávalos, 2007: pp. 32-33).

It is interesting to note that Ávalos's understanding of the empire-form differs from Negri and Hardt's view in their book "Empire" (Hardt & Negri, 2001), as he himself makes a point of mentioning in his book (Ávalos, 2007). For Ávalos (2007), these latter authors attribute the notion of empire to the forces that seek to dominate the world, or rather, to the way in which these forces are configured in the contemporary world, without considering them associated with the dynamics of the movement of capital.

Although the "empire-form" transcends national States, it depends on their actions to consolidate the logic of global capital. The State plays a dual role: internally, it implements policies that ensure the stability of class relations, under the principles of domination and exploitation; externally, it integrates itself into a network of global governance that reinforces the hierarchies between central and peripheral countries under the aegis of this relational logic. To put it in another way, while subordinate States decide, but within the scope of superior determinations; dominant States can decide, as long as they reinforce the relational logic.

As highlighted by Mendes (2022), the State in the capitalist periphery is structurally subordinated to the guidelines of multilateral institutions, such as the IMF and the World Bank, which operate as instruments of the "empire-form". The empire-form, from which the state-form is in fact deduced, is presented as a condition for the possibility of understanding sovereign nation-states and geopolitically weak and subordinate nation-states. This last category, "subordinate," refers to the supreme power of subaltern states within their territories, but which are subordinated to the power of the global enterprise and the power of the imperial center, depending on the geoeconomic and geopolitical (and therefore geostrategic) position they occupy (Ávalos, 2007). In this way, austerity policies, privatizations and structural reforms are often imposed as conditions for access to international financing, forcing peripheral States to direct their resources towards debt servicing and sectors that meet the demands of global capital.

Austerity emerges in this context as an essential tool for adjusting national economies to the logic of global capital reproduction, directing public resources to strategic sectors of capital while restricting public investment in general and, in particular, in social spending (Mendes, 2024b).

In turn, as an effect of the "empire-form", it is worth highlighting Mattei's reflection (Mattei, 2023). This author warns that austerity has been adopted throughout the world of capital, in a generalized way, in the last century, becoming highly present. This refers to an "austerity economy", with the adoption of budget cuts and public moderation of spending, revealing itself as a synonym for the economy in contemporary times.

Thus, austerity is not just an economic policy; it is a central feature of the contemporary economy that ties States to the interests of capital (in its social form) in crisis. The reduction of social spending and the transfer of the costs of crises to workers and the most vulnerable sectors are expressions of this logic. Austerity deepens the economic and political dependence of peripheral states, while consolidating the global inequalities characteristic of the empire form (Dweck et al., 2018).

Evidence shows that, instead of resolving economic crises, austerity tends to deepen them, resulting in economic stagnation and worsening social inequalities and, as Mattei (2023) argues, "preserving the primacy and irrefutability of the capitalist system at times when it is under political threat" (Mattei, 2023: p. 376), especially in a context of polycrisis of capital (Roberts, 2023; Mendes, 2024c) Studies show that instead of solving the perverse effects of the economic crisis, austerity often exacerbates structural problems, with emphasis on the area of public health (Mattei, 2023; Vieira, 2016; Broadbent et al., 2024; Mosteiro, Barbero, & Garcia, 2016). Austerity in Brazil has not only compromised economic growth, but has also intensified the impacts of existing social inequalities (Dweck et al., 2018).

3. Austerity in Brazilian Public Health

In the Brazilian context, the adoption of austerity policies, such as Constitutional Amendment (CA-95), brought devastating consequences for fundamental sectors of society. However, although CA-95 represented a fundamental turning point in fiscal austerity policies in Brazil, it should be born in mind that these policies have been recurrent, characterizing an environment of permanent fiscal adjustment, as argued by Behring (2022). Strictly speaking, these austere fiscal adjustments were initially imposed on the country since the Real Plan (1994) and the Master Plan for the Reform of the State Apparatus (1995), by means of the well-known macroeconomic tripod—primary surplus, high interest rates and floating exchange rates, gaining perverse contours from the new fiscal regime instituted by the new type of coup of 2016, strongly misinterpreted by the health sector (Carnut & Mendes, 2022) whose CA-95 was its main product. In addition, these adjustments have become harsher with Bolsonaro's neo-fascist government (Mattos, 2020), causing dramatic effects on the public budget and social policies, further weakening social and human rights, especially the right to health (Mendes & Carnut, 2019).

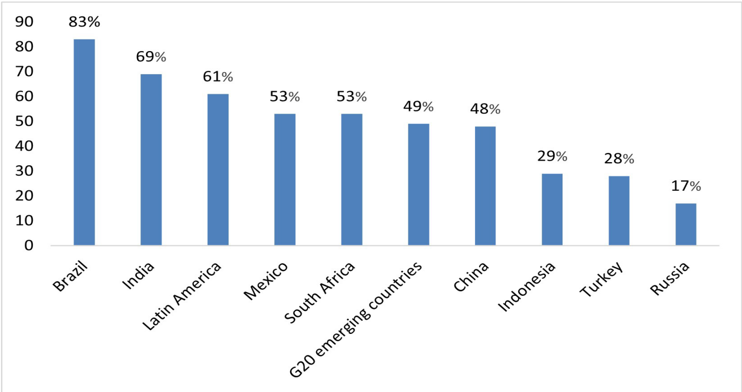
As Mendes (2022) points out, CA-95, for example, consolidated the priority of public debt service over social rights, reflecting a governance logic that subordinates the Brazilian peripheral economy to the demands of the financial market and global capital.

The freezing of investments in health, education, and infrastructure, promoted as a measure of austere fiscal adjustment, greatly compromised the State's ability to meet the demands of the population. The Unified Health System (SUS), for example, suffered from financial cuts that limited its ability to respond in a period of global health crisis, such as the COVID-19 pandemic. If the chronic underfunding of the SUS was already known historically, with CA-95, the situation of this health system worsened, experiencing a deliberate process of defunding (Mendes, 2022).

In the labor market, the flexibilization promoted by labor reforms has deepened the precariousness of labor relations. The expansion of informal work and the reduction of basic rights have further weakened the working class, widening already structural inequalities. Thus, these reforms have not only failed to stimulate economic growth, but have also worsened poverty and reduced social mobility (Dweck et al., 2018).

Austerity has reinforced Brazil's economic dependence on international capital, that is, on the logic of the social relation of reproduction of global capital (the "empire-form"). By directing public resources towards servicing the debt and meeting the demands of foreign investors, the country has compromised its ability to formulate public policies aimed at sustainable development and reducing social inequalities, opening up space in the Brazilian health sector, for example, for the reproduction of capital through the exponential advance of the private sector (Roberts, 2018; Carnut, 2022; Rodrigues, 2023).

To get an idea of the fragility of the Brazilian State in the face of the austerity imposed by the empire-form of global capital, Roberts (2018) presents **Figure 1** below.

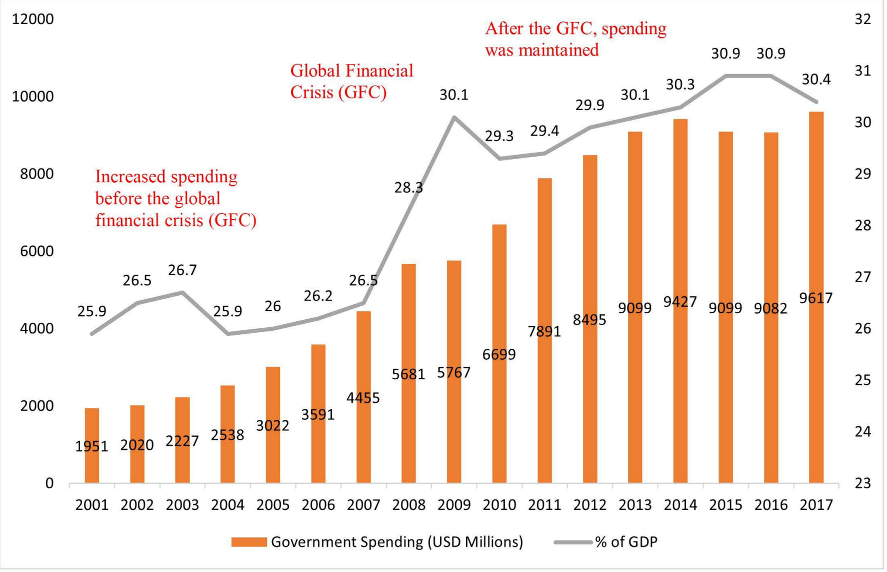


Source: Roberts (2018).

Figure 1. Public Debt/GDP Ratio: Brazil compared to emerging economies (2017).

Figure 1 shows Brazil's public debt situation in 2017, in comparison with other emerging countries, highlighting that Brazil had the highest public debt/GDP ratio among emerging economies (83%). This high level of indebtedness was used as the federal government's central justification for implementing austerity measures, such as cuts in social spending, reductions in public investment and budgetary restrictions, like the introduction of CA-95. It is also interesting to note that in developed capitalist economies this public debt/GDP ratio is also high, such as the USA (122.1%), Japan (252.3%), France (115.6%), the United Kingdom (100.0%), among others (Roberts, 2018).

Figure 2 reinforces this argument by presenting the evolution of government spending in absolute terms and as a percentage of GDP between 2001 and 2017. A significant increase in spending can be observed before the global financial crisis (GFC) of 2008, followed by stabilization and, then, spending restraint.

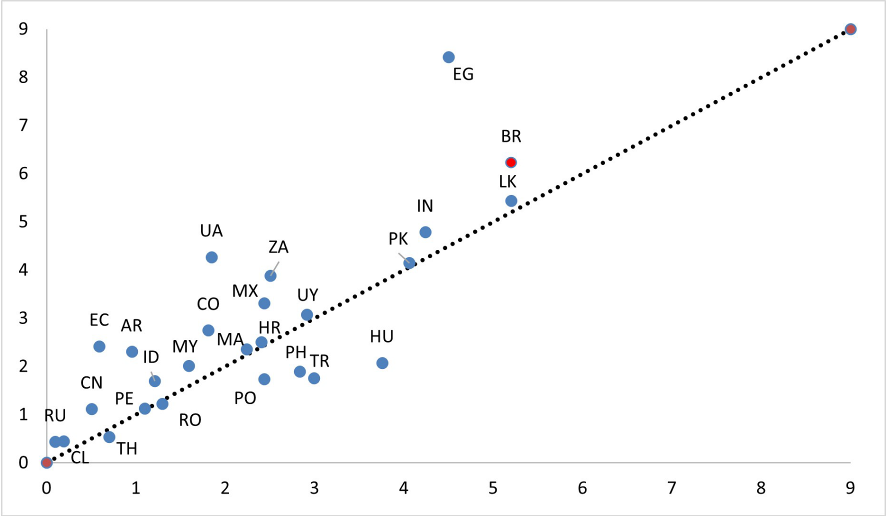


Source: Roberts (2018).

Figure 2. Evolution of Brazilian government spending: USD millions and as a percentage of GDP (2001-2017).

After 2015, austerity measures resulted in public spending remaining at the same level, with negligible growth in 2017, compromising the State's ability to invest in public health and education (Figure 2). It also demonstrates how austerity was not just a response to crises, but a political choice that prioritized fiscal balance over social public policies.

In turn, it is important to note that in the period following the institutional coup (2016), over Dilma Rousseff president, specifically 2018/2019, Brazil made its serious problem regarding the cost of debt service explicit, as one of the most evident signs of the maintenance of the austerity policy, revealing itself to be a country with the highest debt service payments, when compared to emerging countries (Figure 3).



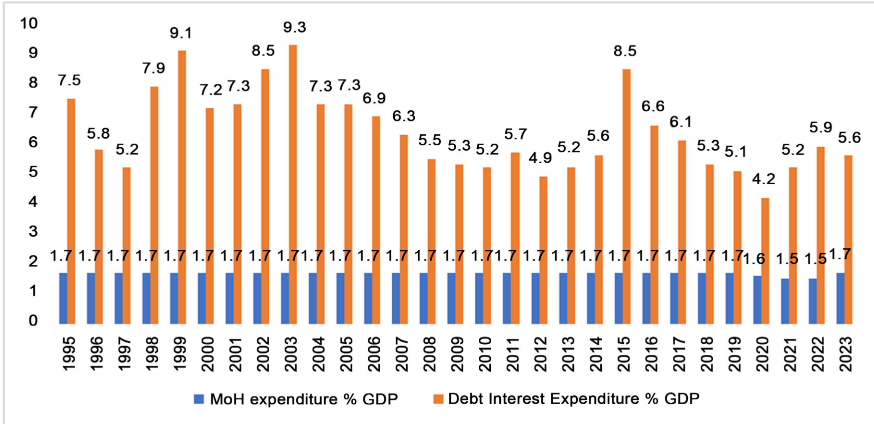
Source: Roberts (2018). Note: RU = Russia; CL = Chile; CN = China; TH = Thailand; EC = Ecuador; AR = Argentina; PE = Peru; ID = Indonesia; RO = Romania; MY = Malaysia; CO = Colombia; UA = Ukraine; MA = Morocco; HR = Croatia; PO = Poland; PH = Philippines; TR = Türkiye; HU = Hungary; UY = Uruguay; MX = Mexico; ZA = South Africa; PK = Pakistan; IN = India; LK = Sri Lanka; BR = Brazil; EG = Egypt.

Figure 3. Debt service costs in emerging countries: international comparison (2018/2019).

Figure 3 shows the growing weight of public debt service payments in Brazil in relation to GDP, indicating that it is among the countries with the highest debt service costs compared to other emerging countries, ranking second after Egypt. This shows that austerity policies have not only failed to control indebtedness, but have also deepened economic dependency and reduced the state's capacity to meet society's social demands.

It is worth noting that the effects of debt service payments in Brazil have prevented growth in social spending. To give you an idea, the Ministry of Health's spending on public health actions and services (ASPS) remained at 1.7% of GDP between 1995 and 2023, while spending on debt interest represented, on average, 6.6% (**Figure 4**). This highlights the government's lack of priority in spending on health—given the instability of financing—but its alignment with financial capital and the austerity policy present throughout the period.

More recently, in Brazil, as a continuation of the ultraneoliberalism imposed by the institutional coup (2016 - over Dilma Rousseff president), its consequences and Bolsonaro's neofascism (Carnut, 2022), there was a continuation of austere fiscal adjustments in relation to cuts in public spending. With the victory of Luiz Inácio da Silva for a 3rd term (October 2022, starting his third government in January 2023), the CA-95 fiscal regime was replaced by a "New Fiscal Framework", in accordance with Complementary Law 200 of 2023, which made budget execution somewhat more flexible. However, the objective of containing expenses and generating a primary surplus was maintained. This is because the "New Fiscal Framework" proposes for the 2024-2027 period to restrict public investment to70% of the real variation in previous revenue, limiting the maximum growth in



Source: Mendes (2022).

Figure 4. Evolution of the Ministry of Health's expenditure and the payment of debt interest, both as a proportion of GDP, in % - 1995-2023.

expenditure to 2.5%. For example, if revenue increases by 2%, expenditure may only increase up to 1.4%. In practice, this investment limit can be considered a setback, as it is characterized as a new ceiling, including for the Unified Health System (SUS), which will be limited to the percentage of Net Current Revenue (RCL), making the constitutional floor secondary (Cunha, 2023).

In the specific case of health, in relation to the financing of the SUS, this "New Fiscal Framework" resulted in the return of the federal minimum for public health actions and services (ASPS) of Constitutional Amendment 86 (CA-86/2015) at the level of 15% of the Net Current Revenue (NCR) of the Union, which was in force before CA-95. Soon after the institutionalization of this framework, demonstrations against the maintenance of minimum investments in public health began to circulate in the media, especially from banking and non-banking financial institutions, under the allegation that they constitute threats to compliance with this new fiscal rule and to the financing of other public policies (Funcia, 2024).

Funcia and Santos (2024) point out that, by aligning the public health floor with the current fiscal framework for 2024, the federal SUS floor would decrease from R$218 billion (calculated by the 15% NCR rule) to around R$194 billion, showing a loss of R$24 billion, which would be added to the approximately R$70 billion lost from 2018 to 2022, due to CA-95, the most brutal austerity measure adopted by the federal government. This new threat to the federal minimum for the SUS constitutes yet another chapter in the permanent austere fiscal adjustments in Brazil, by the self-proclaimed left-wing government, with restrictions and threats to the financing of the SUS in its 38 years of existence.

Also, as part of the ongoing movement of the austerity policy in public health, the National Congress approved a complementary law in October 2023, which deals with financial compensation owed by the Union to other entities of the Federation, changing the way the federal minimum wage in ASPS is calculated in 2023. Article 15 of this law establishes that, in 2023, the minimum application of 15% of the NCR is calculated based on the revenue estimated in the Annual Budget Law

(LOA). This means that it will not be calculated based on the revenue realized in the respective financial year in that year for the SUS. This change led to a decrease in resources in subsequent years (IPEA, 2024).

Thus, it is worth mentioning that despite the revocation of the amendment that froze public spending, the austerity policy remains in place and there is uncertainty about how the new government will behave in relation to the SUS financing framework, in the short and medium term, as well as about the support of the National Congress for the proposals that the current government presents.

4. Concluding Remarks

With the contemporary polycrisis, with firmer steps taken by capital in its dynamics of accumulation and domination, it is necessary to emphasize the theme of the relationship between capital and the increasingly violent empire-form, with the continuation of austere fiscal adjustments, harming the development of public policies that could contribute to improving the living conditions of the working class. This "rationality" of capital's austerity has been achieved in the contemporary world, not in a homogeneous way, but through an imperial logic, as being the logic of the whole, of the modern world, of the world of capital. It is in this sense that it becomes fundamental to understand the philosophically founded expression of the empire-form, a higher level of the State-form, from its deduction of the value-form in the movement of the totality of capital, especially in crisis.

The empire of the capitalist social form of civilization is not of the same type as the ancient or medieval empires. In a different way, its way of functioning is subtle, like the very form of domination that capital hides, allowing for the existence of sovereign national states whose sovereignty is constrained by the logic of capital, with austerity as the synonym of the contemporary world economy.

The Brazilian case reveals a permanent drive for austerity policies since the 1990s, which have persisted to this day through cuts in public spending, especially social spending. The most perverse aspect of this austerity has materialized in one of the policies essential to life, public health, through the defunding of the SUS. It is a question of recognizing that austerity, in the environment of permanent fiscal adjustment in Brazilian health, has allowed the capitalist State to adapt more and more to this logic, and has prevented any structural public response to workers' needs.

Author Contributions

Abrão J.G.S., Mendes A., and Carnut L. contributed to the work through the following activities: substantial contributions to the conception, planning, analysis, and interpretation of data, as well as the final drafting; and significant contributions to drafting the manuscript and critically revising its content.

Conflicts of Interest

The authors declare no conflicts of interest regarding the publication of this paper.

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