Brazil, the BRICS and Active Non-Alignment

Jorge Heine

Abstract: In the context of Brazil's 2025 chairing of BRICS, the contribution the country can make to leverage its own position and that of the Global South via the application of Active Non-Alignment (ANA) is examined. A first section analyzes the new phase opened with the policies enacted by the second Trump administration; a second examines the foreign policy of Brazil in Lula's third term; a third parses BRICS expansion; a fourth defines ANA; and a fifth draws some conclusions.

Keywords: Brazil; BRICS; Active Non-Alignment; foreign policy; Global South.

O Brasil, os BRICS e o Não Alinhamento Ativo

Resumo: No contexto da presidência brasileira do BRICS em 2025, examina-se a contribuição que o país pode oferecer para alavancar sua própria posição – e a do Sul Global – por meio da aplicação do Não Alinhamento Ativo (NAA). A primeira seção analisa a nova fase inaugurada pelas políticas implementadas durante o segundo governo Trump; a segunda examina a política externa do Brasil no terceiro mandato de Lula; a terceira aborda a ampliação do BRICS; a quarta define o NAA; e a quinta apresenta algumas conclusões.

Palavras-chave: Brasil; BRICS; Não Alinhamento Ativo; Sul Global

During a visit to Brazil of Chilean President Gabriel Boric in April 2025, and in reference to the tariffs imposed by the Trump administration, Brazilian President Lula and Boric expressed their unwillingness to be drawn into having to choose between the United States and China. "We don't want to trade with the United States or with China", they said, "We want to trade with both". They thus reaffirmed their commitment to national autonomy, their reluctance to succumb to the pressures of great power competition, and their refusal to align themselves with either Washington or Beijing (Laborde 2025).

At a time when international trade has been upended by the unilateral imposition of steep tariffs *urbi et orbi* by the world's largest economy, when the global system is still reeling from a succession of crises, and U.S.-China tensions reach new heights, a key question for developing nations is how to handle these challenges. An especially thorny issue is that of how to manage great power competition. In the case of Latin America, there is at least one school of thought arguing that "geography is destiny", that when it comes to the crunch, countries in the region will have no choice but to side with the United States (Brands 2023). Contrary to that position, I will argue that, much as Presidents Lula and Boric stated, this is a false choice.

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In fact, the current structure of the international system is especially conducive to what has been referred to as Active Non-Alignment (ANA) (Fortin, Heine & Ominami 2020; 2023). This foreign policy doctrine holds that developing nations

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Jorge Heine *is Research Professor at the Pardee School of Global Studies and interim Director of the Pardee Center for the Study of the Longer-Range Future at Boston University. A former Cabinet Minister in the Chilean government, he has served as Ambassador to China, to India and to South Africa. A past VP of the International Political Science Association (IPSA), he was CIGI Professor of Global Governance at Wilfrid Laurier University (2007-2017) and has held visiting appointments at the universities of Konstanz, Oxford, Paris and Tsinghua (China). He is a founding member of Diplomats Without Borders, on whose board he serves. He has published 18 books, including* The Oxford Handbook of Modern Diplomacy *(Oxford University Press, 2013, 2015), and* The Non-Aligned World: Striking Out in an Era of Great Power Competition *(Polity Press, 2025).*

must put their national interest front and center, refusing to align themselves either with Washington or with Beijing. And if there is one country that has embraced that approach it is Brazil. Brazil is also especially well-placed to exercise a leadership role in it, because of its foreign policy trajectory within the Global South, its commitment to tackling global issues, and its pivotal position between North and South, East and West (Amorim 2021). And in the current moment, as chair of the G20 in 2024, and chair of the BRICS+ group and of COP30 in 2025, Brazil has turned into a veritable diplomatic hub in a highly troubled world.

At a time when "the West", as we had known it, has, for all intents and purposes, ceased to exist, and the transatlantic alliance, for seven decades a bedrock of the Western coalition, is broken, the role of a country like Brazil acquires special significance. In the context of Brazil's chairing of the BRICS group (the fourth time it does so, after having done it in 2010, 2014 and 2019), the purpose of this article is to examine the contribution the country can make to leverage the role of the Global South through the application of ANA. A first section analyzes the nature of the new phase opened with the "America First" foreign policy measures undertaken in 2025 by the Trump administration; a second one looks at Brazilian foreign policy in the first half of President Lula's third term (2023-2024) and its agenda for BRICS 2025; a third looks at the BRICS group and its recent expansion as emblematic of the seismic changes world order is undergoing; a fourth elaborates on the doctrine of Active Non-Alignment (ANA) which inspires Brazil's foreign policy, while a final section draws some conclusions.

THE WORLD UNDER TRUMP 2.0

The first election of Donald J. Trump to the Presidency of the United States in 2016 was considered by many observers as a mere bump in the road in the long trajectory of U.S. exceptionalism and its leadership of the Liberal International Order (LIO) extant since the end of World War II. Key principles of this order were free trade, multilateralism, liberal democracy and Washington's provision of global public goods, the latter being the price to pay for unbridled hegemony (Ikenberry 2018). This notion was seemingly confirmed by the election of Joe Biden, a longstanding member of the internationalist wing of the Democratic Party, to the White House in 2020. Yet, Trump's 2024 reelection on the Republican platform, essentially a repudiation of all the above principles, indicates that era is over. A new period is upon us. In this one, the United States will play a very different role, one guided by very different principles, including protectionism, unilateralism, isolationism and the values associated with authoritarianism.

Perhaps no measure embodies this radical shift as much as those enacted by the U.S. government and that came into effect on April 2, 2025, dubbed "Liberation Day". These were the steep tariffs established for some 90 countries around the world. Although, given the negative reaction of the U.S. stock and bond markets, most of these tariffs were suspended for 90 days shortly thereafter, leaving them at a floor of 10% (except for China, where they escalated to 145%), this still left the United States with an average tariff of 27%. These are among the highest in the world, in stark contrast with the situation *ex-ante* in which they amounted to 3-4%, among the lowest anywhere.

Perhaps most surprising of all has been the degree to which this tariff offensive has been waged against friends and foes alike. Traditional U.S. allies like Canada and the European Union (EU) have not been spared, leading to major shifts in policy. Canada may consider joining the EU, and Europe concluded that it needs to increase defense spending in a major way, since it will no longer be able to count on the U.S. security umbrella, as it did under NATO, an entity that now seems in its last gasps.

Thus, on February 24, 2025, at the United Nations General Assembly (UNGA), we had the odd spectacle of the United States voting with Russia, Belarus and North Korea against a resolution condemning the Russian invasion of Ukraine that took place three years earlier, a resolution backed by almost all European countries (Roth 2025). It was at this point that the very notion of "the West" as we had known it came to an end–the paradox being that it did so not because of its economic decline, but because of its breaking up.

Developing nations have not been spared in these major policy changes enacted in the first few months of the second Trump administration. The closing of USAID and its US$ 70 billion foreign cooperation budget has had an inordinate impact on Africa. There, the ending of the President's Emergency Plan For AIDS Relief (PEPFAR), one of the most successful foreign aid programs ever, has left tens of millions of HIV/AIDS patients without the medicines needed for their very survival (Heine 2025). According to some estimates, 300,000 Africans have died in three months because of the sudden U.S. aid cut-off, and according to the African CDC, 2 to 4 million additional Africans a year are likely to die from it in years to come (Cullinan 2025). In Latin America, mass deportations from the United States of undocumented migrants may wreak havoc across the region, while Mr. Trump's threats to "take back" the Panama Canal have elicited pushback (Freeman 2025). Through his Truth Social platform, Mr. Trump has also warned the BRICS group not to do anything to undermine the role of the U.S. dollar as the dominant international currency, and that the penalties for doing so would be severe, with tariffs to up to 100% (Reuters 2025).

In this context, one in which the U.S.-China trade and tech wars are likely to escalate, the pressures on developing nations to take sides are increasing, and some say that there is no alternative but to side with Washington this time around (Brands 2023). Yet this reflects a fundamental misunderstanding of the structure of the international system, something that Presidents Lula and Boric, in their refusal to choose sides (as mentioned above), are fully aware of. The dynamic of great power competition in our time depends significantly on the respective size of the economies of the competing great powers (Rudd 2021). It also depends on their capacity to deploy resources in this contest for the "hearts and minds" of the nations of the rest of the world. And although the U.S. economy is larger than China's and, in some areas, more advanced, China's larger public sector and its ability to allocate vast resources on critical projects abroad give it an edge that compensates for these advantages. Thus, U.S.-China competition in this regard is quite evenhanded, making it possible for developing nations to play one against the other, which is what Active Non-Alignment is all about. In this regard, the Brazilian case is an especially revealing one, as we shall see below.

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BRAZILIAN FOREIGN POLICY UNDER LULA 3.0

The largest country in the region, with the fifth largest territory in the world, the sixth largest population, and the 9th largest economy, Brazil has traditionally cast a large shadow in world affairs. Its legendary Foreign Ministry, Itamaraty, known for the professionalism of its 1500-strong foreign service, has built its reputation based on the application of an independent foreign policy and a consistent refusal to subordinate to the priorities of the great powers. Recently, this translated into a highly ambitious foreign policy under the presidencies of Fernando Henrique Cardoso (1995-2003) and Luiz Inácio Lula da Silva (2003-2011) (Cepaluni et al. 2012), albeit one that suffered a *capitis diminutio* during the government of Jair Bolsonaro (2019-2023). However, with the return of President Lula to Planalto, the country resumed what Celso Amorim has referred to as its "política externa ativa e altiva" (Amorim 2021).

This was in some ways counterintuitive. Many would have bet that, given Brazil's considerable domestic challenges, Lula would have turned his attention to those, rather than to foreign policy. With 700,000 fatalities from the Covid-19 pandemic (one of the highest such tolls in the world), a highly polarized electorate–evidenced in Lula's razor-thin margin of victory over Bolsonaro in the 2022 elections–and serious economic problems, it would have been perfectly understandable if Lula had opted to turn his attention mainly to the governing of Brazil rather than to world affairs. Yet, that was not the case (see CEBRI-Journal issue 9, 2024, covering Brazilian foreign policy in Lula's first year).

Soon after taking office, Lula launched a peace plan for the war in Ukraine and laid out a strategy to enact it. The latter included a visit to Washington in February 2023, in which he proposed to President Biden the creation of a "peace club" of countries that would facilitate a dialogue between Ukraine and Russia, a club composed mostly of rising powers like China, India, Indonesia and Turkey. Lula also had a teleconference with Ukrainian President Volodymyr Zelensky, while his chief foreign affairs advisor, Celso Amorim, visited Moscow to meet President Vladimir Putin. In turn, Lula continued to promote his peace plan with President Xi Jinping in a visit to Beijing in April 2023. Such an initiative was only made possible because Brazil kept a non-aligned position on the war in Ukraine. This allowed it to deploy a dynamic, pro-active diplomacy, committed to bringing about peace and ending the war, at a time when Western powers signaled their preference for the war to go on "for as long as it takes". The plan did not pan out, but it indicated that Brazil was back on the world stage (Heine & Rodrigues 2023).

This does not mean that Brazil under Lula neglected regional affairs. Understanding that ANA requires a strong dose of regional cooperation, Brazil gave a new impetus to Latin American regionalism. In January 2023, Lula played a leading role in the Community of Latin American and Caribbean States (CELAC) Summit held in Buenos Aires under the Argentine Presidency, where Brazil's return was received like that of the prodigal son (one of the first measures of the Bolsonaro Presidency in 2019 had been to leave CELAC, though the Brazilian Constitution establishes the country's commitment to Latin American regional integration). In May 2023, Brazil called a South American summit that was held in Brasília, the first such diplomatic summit to be held in the region in eight years–a measure of the degree of regional fragmentation. And in August 2023, Brazil hosted an Amazonian Summit in Belém do Pará, with the participation of eight South American heads of State of countries that share the Amazonian Basin, to discuss how to preserve the Amazonian forest and thus continue to fight climate change, a task in which Brazil plays a key role.

On the global stage, much as Brazil refused to ignore the tragedy of the ongoing war in Ukraine, it also took a strong stand on the war in Gaza. In October 2023, as chair of the UN Security Council, Brazil submitted a resolution calling for a ceasefire in Gaza. That resolution was vetoed by the United States, but Brazil continued to push for an end to the war in Gaza in a variety of ways, a matter that led to strong disagreements with Israel, and the mutual withdrawal of ambassadors from Brasília and Tel Aviv. In 2024, as chair of the G20–and continuing along the lines of its two predecessors in that position, Indonesia in 2022 and India in 2023–Brazil pressed for developmental (as opposed to geopolitical) concerns to be put front and center in the global governance agenda. These included the energy transition, sustainable development, the fight against global hunger (taking up an old banner of Lula for hunger eradication, "Fome Zero") and a global tax on the "ultra-rich" (Marques & Guilmo 2024).

The latter, a pet cause of Brazilian Finance Minister Fernando Haddad, proposes a 2% tax on the wealth of some 3,000 ultra-rich billionaires, designed to reduce international tax evasion. A United Nations General Assembly vote on the draft terms for a UN framework convention on international tax cooperation was approved by 110 votes in favor, 44 abstentions and 8 against, on August 16, 2024, showing the degree the notion is gaining traction. Still, strong opposition by the likes of the United States and the United Kingdom, among the most active users of tax havens, makes it unlikely that it will be enacted any time soon. In any case, it is an innovative initiative, with global reach.

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The degree to which Brazilian diplomacy is put to the test, as it hosts major summits and deploys such an ambitious global governance agenda while dealing with U.S.-China tensions, was also on full display at the G20 Summit in São Paulo in November 2024. Although 22 Latin American countries have signed on to the Belt and Road Initiative (BRI), China's major foreign policy project, Brazil is not one of them. Not surprisingly, China let it be known that, given President Xi's scheduled State visit to Brazil following the G20 Summit, a sort of icing on the cake on the occasion would be Brazil coming on board with signing a BRI MOU. At first, Brazil seemed to acquiesce to the idea, though it finally demurred, and stated it would not do so. Much was made of this in foreign media outlets, claiming it signaled a major foreign policy shift away from China and towards the United States, especially since it followed Brazil's vetoing of Nicaragua and Venezuela to join the BRICS group, a decision taken at the BRICS 2024 Summit held in Kazan, Russia, a few weeks before. Yet, such Brazil's decision not to sign on to the BRI indicated nothing of the sort. Xi's State visit went very well, leading to the signing of 37 bilateral cooperation agreements (Heine 2024).

The truth is, Brazil-China relations (with a bilateral trade of US$ 181 billion in 2024) are on such solid footing that the signature of the BRI MOU, a largely symbolic gesture, does not make much of a difference to them. In fact, the larger countries in Latin America, Argentina, Brazil, Colombia and Mexico, have been among the most reluctant to sign on, precisely because they reason that their size gives them sufficient leverage not to need it–although Argentina did sign it in 2022. With Donald J. Trump reelected for a second term in office on November 5, 2024, the last thing Brazil needed at that point was to further "rattle the cage" of U.S.-Brazilian relations by such a conspicuous act of fealty to China as signing on to the BRI. It thus decided not to do so. But its equivocating and giving mixed signals on the subject is very much part of the tactics of Active Non-Alignment. Weaker powers hedge their bets in their dealings with the great powers. This is the prudent thing to do in situations of high international uncertainty like the ones we find ourselves in today. Fully committing to one side under such circumstances can be the road to oblivion. This leads us to the role of Brazil in the BRICS group.

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BRAZIL AND BRICS 2025

If there is one development that embodies the rise of the Global South in the 2022-2025 period it is the emergence of the BRICS+ group (Economist Intelligence Unit 2023). The expansion of the group from five to the current ten members proceeded from the decision taken at the August 2023 Johannesburg XV BRICS Summit to accept the applications of six new members–Argentina, Egypt, Ethiopia, Iran, Saudi Arabia and United Arab Emirates (Pant 2023). A new government that took office in Argentina declined the invitation and Saudi Arabia is still mulling over whether to accept it. In turn, Indonesia was admitted as a full member in 2024. With 45% of the world's population, 35% of the world's gross domestic product (GDP) in purchasing power parity (PPP) terms, and nearly half of the world's oil production, BRICS+ is a force to be reckoned with in world affairs. Admittedly, two key members of the group, Russia and China, are not part of the Global South. The BRICS are thus not a platform of the Global South, but BRICS has made its own the demands of the developing world, and it should be seen as a platform for the Global South.

And the XVII BRICS Summit to take place in Rio de Janeiro on July 6-7 will do so at a very special moment in world affairs. For much of its existence, the group had been derided by Western analysts and commentators as nothing more than a talking shop, made up of member countries with very different political and economic systems, which could not agree on much except criticizing the West. All of this made it allegedly into a highly ineffectual entity whose summits, despite bringing together some of the world's most powerful leaders, should best be ignored by Western media, which is exactly what has happened. The heterogeneity of the BRICS membership was contrasted with the ostensible homogeneity and unity of purpose of the G7, the group of most industrialized nations, something that came to the fore in the West's reaction to the Russian invasion of Ukraine.

Yet, fast forward to 2025, and the situation could not be more different. While the BRICS goes from strength to strength, increasing its membership to nearly half the world's population, the G7 (whose member countries represent less than 10% of the latter) is effectively broken, with the United States in one camp, and the rest of the member States in another. In fact, at a G7 foreign ministers meeting held in Ottawa in March 2025, questions directed by the media at U.S. Secretary of State Marco Rubio did not refer to the G7 but to President Donald Trump's plans to make Canada the 51st state of the Union (Reuters 2025).

In this context, a key question is what has led the BRICS group to expand, something that had not happened for over a decade, ever since the acceptance of South Africa as a new member in 2010. And while there are obvious advantages to the group's larger size, there are also disadvantages. These include greater difficulty in achieving consensus as well as changing the profile of a small group made up of members with vast territories and large populations, States that exercise leadership in their respective regions, to a less clear-cut and more diffuse one. But at least one factor that led the BRICS group to invite applications for new members was the Covid-19 pandemic in 2020-2021. Paradoxically, instead of acting as a catalyst to foster international collaboration to deal with the deadly disease, Covid did exactly the opposite, with "every State for itself" becoming the order of the day. The U.S. quitting the World Health Organization (WHO) in 2020 amid the worst pandemic in a century was Exhibit A of that striking attitude.

And although the virus emerged in China, and China mishandled the original outburst, thus facilitating its worldwide spread that led up to 7 million official deaths in 2020-2021 (though the current estimate is much higher now, up to 18 million), Western "vaccine nationalism" and its extraordinary reluctance to share these vaccines with the rest of the world in the first half of 2021 showed the limitations of a Western-led order, one incapable of dealing with key challenges of the new security agenda, such as pandemics. With an increasingly self-centered and inward-oriented West that pays scant attention to the needs of developing nations, it fell upon China, India and Russia to fill in this void with their own vaccines across Africa, Asia and Latin America. Thus, the realization that something needed to be done in matters of global governance, a task for which a larger BRICS would make it more effective as well as more representative.

Not surprisingly, Brazil's priorities for BRICS 2025, under the motto "Strengthening Global South Cooperation for More Inclusive and Sustainable Governance", thus include in the first place Global Health Cooperation, with focus on ensuring access to medicines and vaccines, as well as to launch the BRICS Partnership for the Elimination of Socially Determined Diseases and Neglected Tropical Diseases. Other priorities include Trade Investment and Finance, with a special emphasis on the reform of financial markets, local currencies and payment instruments and platforms; Climate Change, with special emphasis on climate finance; Artificial Intelligence, and the promotion of inclusive and responsible international governance of AI, so that it unlocks its potential social, economic and environmental development; Multilateral Peace and Security, with emphasis on reforms that help to deal with conflicts, prevent humanitarian disasters and the outbreak of new crises; Institutional Development to improve the structure and cohesion of the BRICS group, which, despite all its progress and over the past two

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decades, is still very much an informal group. This agenda is to be pursued in the more than 100 ministerial and technical meetings of the Brazilian Presidency to be held from February to July 2025.

In short, just at the time when the Western coalition falls apart, the BRICS group has an opportunity to help address some of the most critical global issues. It is the neglect of the latter that has led to the "polycrisis" engulfing the world (Albert 2024). None of this means that there are no differences within the BRICS group on the way forward. The China-India relationship is fraught with tensions. China and Russia would seem to favor making it into an anti-Western entity, a sort of antagonistic counterpart to the G7, though, given the crisis of the latter, this seems somewhat beside the point. On the other hand, Brazil, India and South Africa are in a different position closer to a non-aligned role. In this regard, Brazil finds itself in a sweet spot. As a country in the Western Hemisphere but committed to the Global South; one that has strong relations both with the United States and with China; and one that, as the leading member of MERCOSUR, has recently signed a trade agreement with the European Union, it can do much to make the BRICS group into a constructive and dynamic force in world affairs, one buttressed by Brazil's proven capacity at international coalition building. This is especially needed at a time of global disorder and uncertainty in international affairs.

IS BRAZILIAN FOREIGN POLICY OVERSTRETCHED?

In turn, this leads us to the question as to whether Brazilian foreign policy is attempting to do too much. Would it not be wiser to engage instead in a sort of strategic retreat, one that would accept what should be seen as the alleged inherent limitations of a South American country far removed from the main geopolitical theaters, that faces many domestic challenges and that should thus focus on them, rather than on grandiose foreign policy initiatives? Instead of the assertive foreign policy that Brazil deployed in Lula's two initial terms, and being deployed now in his third term, would it not be wiser to follow instead the foreign policy approach of India for much of the recent past (although no longer), that is of a "reluctant power", with a small foreign service, no grand international initiatives, and no allocation of significant resources to its international projection?

This is the argument made by Ribeiro, Malamud and Schenoni (2024) in a recent article in these pages, building on their previous work, using innovative quantitative techniques to undergird their case. As they indicate, the term "foreign policy overstretch" refers to "a State's ambition to project influence beyond its capacity, potentially leading to overextension and diminishing returns". According to their reasoning, the vast expansion of Brazil's embassy network in Africa, and other initiatives such as the India-Brazil-South Africa initiative (IBSA), its participation in the BRICS group and in projects such as *Fome Zero* undertaken by President Lula in his first two terms in office, initiatives that faced difficulties in being followed up and sustained in the following decade (something for which they provide abundant empirical evidence) would show that Brazil was wrong in taking them up in the first place. In short, that Brazil's whole reaching out to the Global South was a mistake to begin with. According to this logic, Brazil would have done better by sticking to the neighborhood, focusing on strengthening MERCOSUR and the ties with Brazil's traditional diplomatic partners like the United States and Europe, instead of venturing "out of area". Moreover, these authors say, instead of drawing the appropriate lessons from this experience, Lula in his third term, although less daring than previously, continues to engage in some of the same foreign policy behavior.

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While there is much to be said for the application of Ribeiro et al.'s methodological techniques, their overall argument on Brazil's "foreign policy overstretch", in whose support these techniques are deployed, is highly questionable.

To begin with, the notion that a country like Brazil should limit itself to a modest role in international affairs is difficult to justify. And this is not just because of the sheer numbers in terms of territory, population and GDP mentioned above, whose very size makes the country into one of the most significant. It is also because of Brazil's long and distinguished diplomatic tradition, built on the standing of its Foreign Ministry, Itamaraty (Burges 2016). This makes it possible for it to exercise the sort of foreign policy agency other countries can only dream of. This unique combination of a strong "structure" and a strong "agency", quite rare in the developing world, places Brazil in a privileged place in the international system, and constitutes an asset to be leveraged, not minimized. The fact that at one point in the 19th century Brazil was the seat of the Portuguese Empire, and that today it plays a prominent role in the Community of Portuguese Language Speaking Countries (CPLSP)–the association of Portuguese-speaking nations across the Americas, Africa and Asia–gives the country an additional historical trajectory and international reach that no other Latin American nation can match.

Secondly, as it happens, Brazil in Lula's initial two terms, far from engaging in farfetched foreign policy projects that would do little to enhance its influence, rode the wave of the rise of emerging economies that took place in that period. Brazil played an important role in what came to be known as "the decade of the BRICS"–the first decade of the new century. There is a reason why Barack Obama referred to President Lula as "The Man"–not a term U.S. presidents use loosely when referring to foreign leaders (Newsweek 2009). Yes, the subsequent governments in Brazil of Rousseff, Temer and Bolsonaro faced economic and other difficulties and lost interest in foreign affairs. This accounts for the closing of some embassies, and other such measures, but that should not detract from Lula's foreign policy achievements, which gave a significant boost to Brazil's diplomatic, trade and investment links with Africa and Asia.

Thirdly, and most important for the current period, it is surprising that Ribeiro et al. (2024) seem to ignore the veritable irruption of the Global South that took place in world affairs in 2022-2025. This has led *Foreign Policy Magazine* to ask whether 2023 was "The Year of the Global South" (Wilson 2023). Triggered by the Russian invasion of Ukraine, BRICS expansion, and by the war in Gaza, developing nations in Africa, Asia and Latin America in these years have raised their profile in international affairs, distancing themselves from traditional Western positions. This became especially apparent at the 2023 G20 Summit in New Delhi, in which India made its own bid to lead the Global South, the African Union was incorporated as a full member of the group, and development (as opposed to geopolitical) issues took center stage in the extensive, 38-paragraph final Communiqué (Heine, Fortin & Ominami 2025, 37-38). In such a setting, Brazil, with its established, pioneering Global South credentials, is especially well positioned to exercise an inordinately influential role, as has been apparent in Lula's third term, discussed above.

There is thus a curious paradox at work. A common criticism of Lula's current foreign policy is that it would be stuck in the past, singing the same golden oldies, as it were, then it did twenty years ago, without realizing that the world has moved on. Yet, if that criticism is directed at that foreign policy's focus on Global South issues, as well as on key issues on the global agenda (like climate change) more generally–which it largely is–, it fails to recognize the very return of the Global South to the frontlines of world politics in 2022-2025. Thus, in some ways, the world has come full circle. At the same time, the breakup of the West and its increased self-centeredness make calls for Brazil to prioritize, instead, links with its traditional diplomatic partners (as opposed the likes of China, India or South Africa) anachronistic. This new scenario places Brazil in a privileged spot to shape the international agenda, to build coalitions and to advance the country's foreign policy goals.

ACTIVE NON-ALIGNMENT (ANA) AS THE WAY FORWARD

It is in this context that Active Non-Alignment (ANA) emerges as an approach to foreign policy especially suited to dealing with a changing international order. ANA arose in 2019-2020 in response to a triple whammy hitting Latin America: the Covid-19 pandemic, the biggest economic downturn to hit the region in 120 years, and the pressures of the Trump administration to cut down on business with China. In reaction to this rather intimidating scenario, Fortin, Heine and Ominami (2020; 2021) proposed ANA as the best way to deal with it, taking a page from the Non-Aligned Movement of the sixties and seventies, but adapting it to the very different realities of the new century. This includes a wealth shift from the North Atlantic to the Asia-Pacific, and a major increase in South-South trade (now above 50% of global trade, as opposed to a mere 20% in the sixties). In the new century, the *diplomatie des cahiers de doleances* of the old Third World has been replaced by the collective financial statecraft of the New South, with entities like the Asian Investment and Infrastructure Bank (AIIB), the New Development Bank (chaired by former Brazilian President Dilma Rousseff), and the Latin American Development Bank (CAF) (Roberts, Armijo & Katada 2017). ANA sets forth the need to put the national interest of the countries involved front and center and not give in to the pressures of great powers.

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ANA is not about neutrality, an international law concept associated with the role of third parties in armed conflicts, nor is it about equidistance between the great powers, as on some issues developing countries may be closer to the United States, and others to China. What it does mean is that countries refuse to side *a priori* and *in toto* with one or another of the great powers, proceeding to evaluate each issue on its merits instead. Its basic premise is that, although world order is very much in flux, and there are many moving parts, a key dynamic of it is, and will continue to be, the competition between the United States and China, one that has acquired renewed impetus in the second Trump administration.

The question for developing nations is thus how to manage this rivalry. Given this great power competition between the United States and a competitor that describes itself as Communist, some refer to this as the Second Cold War (Sanger

2024). Yes, there are some parallels, but there are also significant differences. The Soviet Union was a superpower with large military, technological and ideological capabilities. That said, it also had a closed economy, and one far smaller than that of the United States. Thus, its trade, foreign investment and financial cooperation with what was then known as the Third World was limited.

Conversely, today's China has a far more open economy, it is also the largest economy in the world measured in PPP terms and is projected to be the largest in nominal terms at the beginning of the next decade. This great power competition thus happens as a declining power faces a rising power. Under such circumstances, the hegemon will turn inwards, blame the rest of the world for its problems, and establish all sorts of barriers to trade, investment and people flows. In turn, the rising power, because it feels the need to show it is on an upward trajectory, will reiterate its commitment to an open economy and free trade, as well as to international collaboration. This is what is happening in the United States and China, respectively (Heine, Fortin & Ominami 2025).

Yet, both powers feel the imperative to win the "hearts and minds" of governments and peoples across the world–one of them to show that it is still the hegemon, and the other that it is up and coming. This is what opens the door to Active Non-Alignment. The grand strategy of ANA is thus "playing the field", by which I mean sounding out which of these powers will provide them with the best terms on any given project, be it a port, a railway line, a dam or a credit line. And while the United States is a larger, more advanced economy than China scientifically and technologically, its public sector is smaller, and the U.S. government is less able to channel resources to international projects than the Chinese government.

Rather than pushing BRICS towards a confrontational stance with the United States and Europe, as China and Russia seem at times to be tempted to do, Brazil should press towards finding common ground in addressing global challenges.

And, as we saw above, the tactic of ANA is hedging, meaning you cover your back and tread carefully in handling an uncertain and unpredictable international situation in which the possibility of nuclear war has once again raised its ugly head. And while countries like Colombia and South Africa have made it explicit, and others have not, across the Global South, from Brazil and Honduras in the Americas; Angola, Kenya and Mozambique in Africa; and India, Malaysia, Indonesia and Vietnam in Asia; among many other countries, ANA is being applied. It provides a guide to action, a compass to navigate the troubled waters of a world in the throes of change, and one in which Brazil is playing a leading role.

CONCLUSION

In the mere span of little over a year, Brazil will have chaired and hosted the G20, the BRICS+ and COP30. This is not happenstance, but, rather, the result of a foreign policy of long-standing that anticipated early on the rise of the South as a force to be reckoned with in world affairs and placed Brazil in a pole position within it. Brazil's refusal to take sides in the great power competition that is taking place between the United States and China has also contributed to this favorable positioning. The case of the BRICS is especially revealing, as its 2025 Rio Summit will take place just at the time when the G7 has imploded, and the narrative of Western unity has fallen apart. In such a fluid situation, a country like Brazil can and should play a key role in steering the BRICS group, which has been vital in stressing the developmental demands of the Global South, in the right direction. Rather than pushing BRICS towards a confrontational stance with the United States and Europe, as China and Russia seem at times to be tempted to do, Brazil should press towards finding common ground in addressing global challenges.

In terms of global health, doing the needful for the world to be prepared for the next pandemic would be an obvious goal, for which the establishment of the Accord for Pandemic Prevention and Preparedness, a process on which the World Health Organization (WHO) agreed on April 16, 2025, would be an important step. On trade, steps to reinvigorate the World Trade Organization (WTO) would be welcome. On finance, rather than aim for a BRICS currency to replace the U.S. dollar, something that at this point is not viable, pressing for ways to increase intra-group trade in local currencies to the maximum extent possible is urgent. The current situation–in which the U.S., with less than a 15% share in global trade, can count on the exorbitant privilege of having the dollar as the *de facto* international currency, and weaponizing it for its own strategic purposes with unilateral sanctions that wreak havoc in the world economy–is unsustainable. As the preeminent Amazonian nation, Brazil also should have much to say on the way forward in the fight against climate change, something in which the issue of its financing looms large.

In short, Brazil has its work cut out for it.

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Como citar: Heine, Jorge. 2025. “O Brasil, os BRICS e o Não Alinhamento Ativo”. *CEBRI-Revista* Ano 4, Número 13 (Jan-Mar): 40-57.

To cite this work: Heine, Jorge. 2025. “Brazil, the BRICS and Active Non-Alignment.” *CEBRI-Journal Year* 4, No. 13 (Jan-Mar): 40-57.

DOI: https://doi.org/10.54827/issn27647897.cebri2025.13.02.03.40-57.en

Submitted: May 5, 2025
Accepted for publication: June 5, 2025