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Democracies under Pressure: Polarization, State Capacity,
and the Brazil-US Relations

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Abstract: Brazil and the United States face parallel democratic stress tests. In the United States, polarization and veto-heavy institutions hinder housing, infrastructure, and clean energy. In Brazil, party fragmentation preserves formal governability but increases the cost and fragility of decision-making. As US polarization encourages more transactional geoeconomic statecraft, partners such as Brazil face persistent uncertainty. Under these conditions, the article argues that Brazil-US cooperation is more likely to endure when anchored in delivery, including contracts, procurement, shared standards, and supply chains that generate practical interdependence.

Keywords: democracy; polarization; state capacity; Brazil-United States relations; foreign policy; governance.

Democracias sob pressão: polarização, capacidade estatal e a relação Brasil-Estados Unidos

Resumo: Brasil e Estados Unidos enfrentam testes paralelos de estresse democrático. Nos EUA, a polarização e instituições com forte poder de veto dificultam habitação, infraestrutura e energia limpa. No Brasil, a fragmentação partidária preserva a governabilidade formal, mas aumenta o custo e a fragilidade da tomada de decisões. À medida que a polarização nos EUA incentiva uma geoeconomia mais transacional, parceiros como o Brasil enfrentam incerteza persistente. Nessas condições, o artigo argumenta que a cooperação entre Brasil e Estados Unidos tem mais chances de perdurar quando ancorada na entrega, incluindo contratos, compras públicas, padrões compartilhados e cadeias de suprimento que geram interdependência prática.

Palavras-chave: democracia; polarização; capacidade estatal; relações Brasil-Estados Unidos; política externa; governança.

DEMOCRACIES IN FLUX

Brazil and the United States are two continental democracies undergoing parallel stress tests. In 2024, they marked 200 years of bilateral relations, reminding us that one of the Western Hemisphere's most consequential relationships is entering a more fragmented era.

Both countries combine large, diverse societies with global leverage. One sits at the core of the industrialized system; the other is a central actor in the Global South. Both are pivotal to climate governance, energy transitions, food security, and the regulation of digital and financial infrastructure, yet understanding Brazil-US relations in the twenty-first century requires moving beyond diplomatic agendas, trade flows, or episodic political alignment.

A deeper condition increasingly shapes the relationship: a shared crisis of democratic performance, visible in housing shortages, stalled infrastructure, and rising costs for basic public services. Here, scarcity refers to political and regulatory systems that fail to expand the supply of housing, infrastructure, clean energy, and services at the pace society demands. In both countries, political inclusion and social change have advanced faster than the State's capacity to deliver material outcomes and credible mobility. That gap has become a central driver of polarization.

Brazil and the United States thus function as imperfect mirrors. Their institutions differ sharply, but, in both cases, domestic conflict now operates within governance frameworks that have fallen out of sync with economic and social realities. Polarization reflects a deeper inability of democratic systems to deliver, with consequences that increasingly spill into foreign policy.

This shift already shapes the future of Brazil-US relations. Sustaining cooperation under these conditions requires shifting attention away from episodic alignment toward the institutional and material foundations that can anchor cooperation despite political swings. In practice, Brazil increasingly negotiates with a United States whose external posture shifts with domestic coalitions and their incentives.

This article proceeds from the premise that polarization is not merely a political mood, but the expression of deeper constraints on democratic performance. It first situates polarization within debates on State capacity and identity conflict; then

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compares how institutional design in Brazil and the United States channels these pressures in distinct ways; it subsequently examines how domestic strain spills into foreign policy and reshapes bilateral dynamics. The concluding section advances a pragmatic framework for cooperation centered on delivery, arguing that material interdependence and institutional design offer a more durable foundation for Brazil-US relations than alignment based solely on shared values.

POLARIZATION: SYMPTOM OR CAUSE?

Contemporary polarization reflects a shift in the nature of democratic conflict. Democracies are designed to absorb conflict over policy. What has changed is that disagreement no longer centers on outcomes, but on legitimacy itself. Politics becomes existential rather than negotiable, and informal norms that once restrained behavior lose their force.

As States struggle to provide material security, economic dissatisfaction is increasingly expressed through identity rather than class. In this case, identity offers a stable heuristic in low-trust environments, permitting citizens to interpret loss, assign blame, and coordinate politically when institutions no longer deliver predictably.

Economic frustration has rarely translated into straightforward class-based politics. As Dani Rodrik (2021) argues, distributive conflict is increasingly rerouted into identity conflict. Globalization shocks generate economic losers and activate latent social cleavages, determining how material decline is interpreted. Political entrepreneurs capitalize on this pattern by recoding economic grievances as cultural injury, a strategy that yields higher political returns than programmatic redistributive agendas.

Once polarization hardens around identity, mutual toleration erodes. Institutional forbearance gives way to maximalist tactics, from procedural obstruction to the aggressive use of legal authority, justified in the name of democratic survival. Courts and electoral authorities lose standing as neutral referees. Democratic form persists, but governance becomes incoherent as institutions are no longer accepted as legitimate intermediaries.

Polarized democracies rarely collapse through coups or suspended elections. They hollow out from within. Formal rules remain intact, but their function changes. As Steven Levitsky and Lucan Way (2010) observe, democratic procedures may be preserved while increasingly bent to partisan ends. Extreme polarization accelerates this process by normalizing norm-breaking once rivals are framed as existential threats and not as adversaries.

HOW POLARIZATION BECOMES SELF-REINFORCING

Affective polarization is sustained not only by voter attitudes but by institutional incentives that reward extremism and weaken moderation. In the United States, changes to candidate selection, media ecosystems, and political entrepreneurship have steadily eroded traditional gatekeeping mechanisms.

The expansion of binding primary elections shifted nomination power from party elites to highly motivated partisan bases, while celebrity politics and digital media lowered barriers for candidates able to mobilize attention and outrage. Gerrymandering reinforced this dynamic by moving meaningful electoral competition into primaries, rewarding ideological intensity and penalizing compromise (Jasny et al. 2025).

These trends have been compounded by the hollowing out of party organizations. Mid-twentieth-century “big tent” parties, once structured around overlapping ideological and social identities, have given way to more homogeneous coalitions. As cross-cutting identities weaken, partisan affiliation hardens, and opportunities for coexistence diminish (Broockman, Kalla & Westwood 2022).

Polarization is not only a bottom-up phenomenon. Elite behavior remains decisive. When political leaders enforce norms and refuse opportunistic alliances, they can constrain extremism even under conditions of social stress. When they do not, polarization accelerates. As Steven Levitsky and Daniel Ziblatt argue, erosion often begins with “fateful alliances,” when establishment actors tolerate or empower extremists for short-term gain. Over time, repeated norm violations lower the threshold of acceptable conduct, expanding the range of legitimate political tactics.

SCARCITY AND DEMOCRATIC BREAKDOWN

Polarization becomes most destructive when governments cannot deliver basic material outcomes: housing that people can afford, infrastructure that works, energy that is reliable, and services that are reachable. When supply cannot expand, everyday life feels zero-sum. Political loss becomes frightening because it appears to be exclusion from a fixed pool of opportunities.

Recent work on abundance helps clarify why failures of delivery so reliably intensify polarization. Ezra Klein and Derek Thompson (2025) argue that many advanced democracies, most visibly the US, have not run out of resources or capacity, but have constructed systems of chosen scarcity. Over time, layers of procedural complexity, litigation, and veto points have made it extraordinarily difficult to build housing, infrastructure, or clean energy at scale, even when funding and political support are available. Scarcity, in this sense, is produced by institutional design (Santos 2025).

When States cannot expand supply, politics shift accordingly. Economic life is experienced as a zero-sum struggle over access to fixed goods. Electoral loss becomes intolerable not only because it signals policy disagreement, but because it threatens exclusion from increasingly scarce opportunities. As delivery stalls, institutional restraint erodes, and polarization hardens into existential conflict.

In this context, identity conflict functions as a substitute for material delivery. Economic frustration is reframed as cultural struggle, converting distributive failure into moralized antagonism and reinforcing affective polarization.

BRAZIL AND THE UNITED STATES: IMPERFECT PARALLELS

Brazil and the United States face similar symptoms under different institutional rules. In both, polarization rises when social expectations outrun the State's capacity to deliver. What differs is the pathway. In the United States, veto-heavy institutions turn conflict into scarcity and chronic underbuilding. In Brazil, fragmentation keeps the system moving, but at the price of opaque bargaining and high transaction costs.

The central economic trigger in the US has been a prolonged cost-of-living crisis that is not the result of technological limits or insufficient wealth, but of institutional design. Regulatory vetocracy, combined with restrictive zoning, litigation-heavy governance, and procedural overreach, has made housing, healthcare, and clean energy persistently expensive. As access to upward mobility narrows, economic pressure intensifies zero-sum thinking. Material insecurity is increasingly reframed as a cultural threat, reactivating racial and nativist cleavages and empowering movements that promise national closure and restoration.

Brazil's trajectory shows a different, though no less corrosive, dynamic. Political and social inclusion expanded rapidly during the 2000s, fueled by rising incomes, access to credit, and increased

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consumption, but without corresponding enhancements in public services or State capacity. Mobility was real but fragile. When economic growth slowed and credit contracted, this climb stalled. Expectations rose faster than institutional performance, resulting in widespread dissatisfaction with governance quality. This shaky inclusion deepened dependence on the State among lower-income groups while intensifying resentment among elites and segments of the middle class, who increasingly framed the State as inefficient, corrupt, and captured by the redistribution process. The result was a polarized cleavage between “statism” and “market,” in which delivery failures were translated into broad anti-system sentiment.

In both countries, economic failure sharpened historical divides, but in opposite directions. America saw scarcity heighten conflict over who belongs in a system perceived as closed. In Brazil, precarious inclusion intensified disputes over the State’s role in a society in which access expanded without stability. The political outcomes diverged in form: a nativist backlash in one case, an anti-system revolt in the other. But they converged in substance: a deep erosion of faith in the capacity of democratic institutions to deliver material security and social cohesion.

SHARED STRUCTURAL SYMPTOMS

In both democracies, polarization has weakened the legitimacy of institutions that are charged with serving as neutral arbiters. Courts, electoral authorities, oversight bodies, and segments of the media have lost their standing as trusted referees. As citizens cease to trust neutral enforcement, they increasingly demand partisan actors willing to exploit institutions for their own ends.

In the United States, deindustrialization, the “China shock,” and prolonged income stagnation activated latent racial and cultural divisions. Economic insecurity was reframed as loss of status and national decline, fueling nativism and racialized resentment. As Clifford Young documents, nativism, defined as privileging the native-born over outsiders, has become the central axis of political division, transforming material anxiety into a politics of belonging most clearly expressed in the MAGA movement.

In Brazil, economic and social tensions followed a different trajectory. André Singer’s (2012) analysis of *lulismo* shows how the political realignment of the 2000s unified the subproletariat around the promise of State protection and modest inclusion, while segments of the traditional middle class experienced this process as displacement. Redistribution and social mobility were interpreted not only as economic changes but as threats to merit, order, and moral hierarchy. Although rooted in income and inequality, Brazilian polarization is expressed culturally as a struggle between “order and meritocracy” and “statism and dependency.”

DIVERGENT INSTITUTIONAL PATHWAYS

Although Brazil and the United States display similar symptoms of democratic strain, their institutional architectures channel polarization in markedly different ways.

In the United States, rigid bipartisanship has fused partisan identity with race, religion, geography, and culture, transforming political competition into a zero-sum struggle between two increasingly homogeneous camps. The expansion of binding primaries weakened party gatekeeping, letting candidates with strong media appeal or extremist rhetoric to bypass elite screening. Combined with multiple institutional veto points, this configuration has produced a form of vetocracy: governance is easily blocked, but collective action is extraordinarily difficult. Polarization in this setting paralyzes the State, reinforcing scarcity and validating populist claims that democratic institutions are incapable of delivery.

Brazil's multiparty presidentialism produces a different dynamic. Fragmentation does not freeze the system; it reconfigures governability. Since the mid-2000s, and especially after 2015, Congress has expanded its institutional and budgetary power, transforming itself from a reactive arena into an active lawmaking and resource-allocating actor. Through reforms governing mandatory and discretionary budget amendments, legislators curtailed executive agenda-setting and bargaining capacity, forcing presidents of all ideological stripes into continuous, high-cost negotiation. Polarization in this setting does not block action outright; it raises the political cost, weakens transparency, and shifts decision-making toward transactional, opaque exchanges.

The judiciary shows a parallel divergence. In the United States, polarization increasingly appears through attempts to capture institutional referees. Courts, most notably the Supreme Court, have become central arenas of partisan struggle, with judicial decisions frequently constraining regulatory authority and sustaining institutional paralysis.

In Brazil, by contrast, judicial power has expanded less through capture than through institutional displacement. As executive coordination weakened and Congress consolidated control of budgetary execution, responsibility for policy outcomes became fragmented. In this context, the Judiciary, particularly the Supreme Federal Court, sought to address unresolved gaps in authority by intervening in electoral governance, budgetary disputes, and executive-legislative conflicts. This protagonism proved stabilizing during acute moments of institutional stress, most notably after January 8, 2023. Over time, however, repeated reliance on judicial arbitration risks politicizing adjudication and shifting accountability away from elected institutions.

This judicial protagonism has often functioned as a stabilizing mechanism under conditions of acute political stress, when courts acted to preserve constitutional order amid institutional paralysis. Over time, however, its cumulative effects are more ambiguous. As courts are repeatedly called upon to arbitrate distributive and coordination conflicts that elected institutions fail to resolve, adjudication risks substituting for political negotiation. The result is a gradual politicization of judicial authority and a shift of accountability away from representative institutions, placing courts closer to the center of governance than democratic design intended.

POLARIZATION AT HOME, INSTABILITY ABROAD

Polarization in the United States now extends to foreign policy through institutions that were once steadier than elections. Trade tools, regulatory pressure, and control over financial and digital infrastructure are pulled into domestic conflict. For partners such as Brazil, the issue is less any single disagreement than the growing uncertainty surrounding reliability.

As domestic politics becomes increasingly existential, foreign policy is less insulated from internal factional incentives. Electoral competition centered on apparent threats to democracy and identity reduces the political payoff of rule-based engagement, accelerating a turn toward volatile, transactional forms of geoeconomic statecraft with immediate consequences for Brazil's strategic environment.

Polarization in the United States has collapsed the boundary between domestic culture wars and external economic policy. Foreign policy increasingly functions as an extension of internal political conflict, used to reward ideological allies and punish perceived adversaries.

The Trump-Bolsonaro axis illustrates this shift. As Feliciano de Sá Guimarães (2025) argues, these ties were not institutional but factional. Trump's repeated declarations of "total and complete support" for Jair Bolsonaro, and parallel efforts by Brazilian political actors to activate these links represented an attempt to internationalize Brazil's domestic political struggle. In this framework, the United States ceased to function as a neutral diplomatic interlocutor and instead became a partisan actor within Brazil's internal contestation.

This logic extended into explicit trade threats. In a July 2025 letter to President Lula, Trump warned of tariffs of up to 50% on Brazilian exports, blending commercial claims with allegations of a "witch hunt" against Bolsonaro. Trade instruments were no longer framed as tools to address economic distortions, but as leverage to influence Brazil's domestic institutional disputes.

This factionalization of foreign policy is reinforced by a wider transformation in how the United States exercises power. Washington increasingly monetizes its hegemony by leveraging control over critical nodes of the international system.

The United States retains structural dominance over dollar-clearing mechanisms, cloud-computing infrastructure, satellite networks, defense platforms, and financial regulation. Under conditions of intense polarization, these assets are deployed as instruments of coercion. Access to technology, finance, or security cooperation becomes contingent on political alignment rather than shared interest.

For Brazil, this erosion of predictability calls for strategic diversification. Engagement with China, participation in BRICS, and support for South-South cooperation reflect risk management rather than ideological realignment. Public opinion data reinforce this logic: most Brazilians see no contradiction in keeping relations with both Washington and Beijing, rejecting demands for exclusive alignment.

As US polarization reshapes foreign policy, institutional reliability becomes the principal casualty. Long-term commitments are increasingly vulnerable to short-term electoral incentives, forcing partners to treat US policy continuity as contingent rather than given.

The consequences go beyond trade and technology. US polarization exports democratic instability. Investigations initiated under Section 301, framed around alleged unfair practices or restrictions on free expression, have reflected the rhetoric of Brazil's domestic radical right. By questioning judicial independence, electoral governance, or anti-corruption enforcement, Washington signals a willingness to contest the legitimacy of Brazilian institutions when election results become politically inconvenient.

Rather than anchoring institutional stability, Washington is functioning as a source of volatility. Brazil's external environment is, therefore, best understood as one of structural unpredictability: the country no longer engages with a coherent "West," but with a United States whose external behavior is increasingly controlled by its internal polarization. The strategic question that follows is not one of alignment, but of how cooperation can be designed to survive political instability without jeopardizing institutional sovereignty.

Taken together, these patterns invert the traditional role of the United States in the hemisphere. Rather than anchoring institutional stability, Washington is functioning as a source of volatility. Brazil's external environment is, therefore, best understood as one of structural unpredictability: the country no longer engages with a coherent "West," but with a United States whose external behavior is increasingly controlled by its internal polarization. The strategic question that follows is not one of alignment, but of how cooperation can be designed to survive political instability without jeopardizing institutional sovereignty.

WHAT TO DO: FROM ALIGNMENT TO DELIVERY

Middle powers such as Brazil bear disproportionate risks in periods of geopolitical volatility. Unlike great powers, they depend less on unilateral leverage than on predictability, institutional continuity, and rule-based cooperation. As US domestic polarization continuously shapes foreign policy, commitments become more reversible and rules more contingent—conditions that large powers can absorb through scale, but that concentrate risk on actors with limited capacity to hedge volatility.

Because polarization now structures governance rather than intermittently disrupting it, cooperation can no longer assume policy continuity as the default. The task, then, is not to recreate a previous equilibrium, but to rethink cooperation so that it continues to function amid political instability.

REBUILDING DEMOCRATIC LEGITIMACY THROUGH DELIVERY

Rebuilding State capacity does not mean weakening accountability. The problem facing many democracies today is not too much scrutiny, but too little ability to act once decisions are made. Democratic legitimacy still requires participation, contestation, and judicial review; what has eroded is the system's ability to designate institutional actors empowered to act once those processes have occurred. Restoring delivery, therefore, depends not on personalist leadership or emergency powers, but on rule-bounded discretion exercised by accountable institutions.

The consequences reach outside domestic governance. In a divided world, cooperation that relies on shared values, summitry, or broad treaties is inherently fragile. Cooperation that endures is anchored instead in material necessity, contractual obligation, and distributed execution. The point is not to discard some of the existing frameworks, but to make them harder to undo and to redesign them around delivery, reduced exposure to political whiplash, and the creation of hard-to-reverse forms of interdependence.

Polarization feeds on scarcity, whether real or institutionally produced. When governments cannot deliver housing, infrastructure, security, or energy at a reasonable cost, democratic competition hardens into a fight over a shrinking pie. Identity becomes the language through which material frustration is interpreted, and institutional forbearance collapses under existential stakes.

For the United States, the corrective lies in moving from a procedural State to a producing State: simplifying veto points that enable obstruction, rebuilding permitting capacity, and designing policy to expand supply rather than merely subsidize demand. The payoff is not merely economic, but political: abundance reduces zero-sum dynamics and lowers the stakes of political loss.

For Brazil, the challenge is different but related. Democratic stress is rooted in precarious inclusion, mobility achieved through consumption without a commensurate expansion of public goods. An abundance agenda in Brazil, therefore, centers on the State's capacity to deliver universal services and strategic infrastructure, transport, sanitation, energy transmission, and logistics, without sacrificing accountability. Where delivery fails, foreign-policy volatility reinforces domestic distrust, turning external cooperation into further evidence that democratic systems cannot produce results.

DESIGNING COOPERATION THAT SURVIVES POLARIZATION

If polarization erodes continuity, then continuity must be engineered. The bilateral relationship can no longer rely on shared values or assumptions of policy stability across administrations. Cooperation must instead be designed to function despite political oscillation.

For Brazil-US relations, three design choices are decisive: embedding cooperation in procurement and contracts, insulating implementation through technical and subnational channels, and reducing single-point dependence in strategic infrastructure.

Cooperation endures when it is costly to reverse. Long-term offtake agreements, advance market commitments, and price-support mechanisms embed cooperation in procurement and investment decisions, binding public agencies and private actors alike (Santos et al. 2025). In areas such as critical minerals and industrial decarbonization, once buyers, producers, regulators, and financiers are aligned around defined production pipelines and standards, cooperation becomes anchored in mutual dependence rather than rhetorical goodwill.

A related shift concerns the focus of cooperation itself. Rather than negotiating targets in the abstract, effective cooperation increasingly operates through demand

creation for outputs that have not yet been produced at scale. Advance purchase commitments for green industrial inputs, low-carbon steel, cement, sustainable aviation fuel, or vaccines translate political ambition into predictable demand, crowding in private investment and shifting diplomacy away from distributive conflict over “who pays” toward the practical question of “who produces.”

The politicization of global infrastructure additionally reinforces this logic. Financial systems, cloud services, satellite connectivity, digital platforms, and payment rails are no longer neutral backdrops to cooperation; they are exposed to purposeful leverage. Designing cooperation under these conditions requires treating infrastructure vulnerability as a structural constraint. The objective is not technological autarky, but the avoidance of single-point dependence through redundancy and interoperability.

Institutional channeling also matters. When polarization increases volatility at the national level, cooperation often survives through arenas less exposed to partisan swings: regulator-to-regulator engagement, agency-level compacts, State-to-State cooperation, and city networks. These channels do not replace diplomacy, but they often provide continuity when national-level political signals turn adversarial.

Two constraints apply. Where core sovereignty is at stake—constitutional order, electoral governance, and judicial independence—containment is unavoidable. At the same time, outright rupture is neither feasible nor desirable. Cooperation must therefore be selective: anchored in material interdependence, institutionalized by past individual leaders, and insulated from partisan reversal.

BRAZIL’S STRATEGIC ADVANTAGE: A PROBLEM-SOLVING PARTNER

The analysis shows that Brazil and the United States are imperfect mirrors, not because their institutions match, but because both reveal how democracies under stress convert material failure into identity conflict, and identity conflict into foreign-policy instability. Cooperation remains possible, but it can no longer assume political convergence or domestic stability as its baseline.

In this context, Brazil’s strategic value does not derive from ideological agreement or rhetorical affinity. It derives from its position in domains in which US constraints are structural rather than cyclical, and in which demand is likely to persist regardless of partisan control in Washington. These include diversified critical minerals, clean energy based industrial inputs, climate-relevant agricultural production, and cooperation on transnational security challenges related to organized crime and environmental crime.

By anchoring cooperation in concrete capabilities rather than political affinity, Brazil can negotiate from a position of functional indispensability, translating cooperation into technology transfer, long-term investment, and industrial upgrading without becoming a proxy in another country's culture war.

Under these conditions, Brazil functions less as a peripheral middle power seeking shelter and more as a consequential partner whose assets shape the terms of cooperation.

CONCLUSION – COOPERATION AMONG IMPERFECT DEMOCRACIES

The main risk facing polarized democracies today is not sudden breakdown, but democratic incoherence. Elections continue, constitutions remain in force, but the State becomes an unreliable actor. Governments struggle to implement decisions consistently, and institutions lose credibility as neutral arbiters and providers of public goods at scale.

In both Brazil and the United States, democratic legitimacy has weakened less because citizens reject democratic ideals than because democratic systems have fallen short on delivery. Housing, infrastructure, security, and basic public services have not kept pace with social expectations. The paths differ. In the United States, polarization combined with veto-heavy institutions produces scarcity and chronic underbuilding. In Brazil, fragmentation preserves formal governability but raises transaction costs and pushes decision-making toward opaque bargaining. In both cases, delivery failures raise the stakes of political competition and turn routine disagreement into identity conflict.

At the same time, democratic systems have adaptive capacity. Episodes of crisis-driven delivery show that, when bottlenecks are resolved and incentives align with outcomes, democracies can still act. The challenge is not to weaken safeguards, but to rebalance governance toward delivery, restoring the social contract through tangible results rather than symbolic commitments.

The Brazil-United States relationship shows why value-based alignment is no longer a reliable foundation for cooperation. In polarized systems, norms are contested at home and vulnerable to electoral reversal. As American foreign policy becomes more transactional and more closely tied to domestic political conflict, partners face structural uncertainty. Instead of trying to restore the previous equilibrium, the focus should be on designing cooperation that can function when volatility becomes routine.

The analysis points toward a shift away from alignment as the primary anchor of cooperation and toward delivery as its more durable foundation. Cooperation

proves more resilient when it rests on concrete mechanisms that are costly to unwind. Procurement commitments, long-term contracts, shared standards, and supply chain integration bind public institutions and private actors to common timelines and investments. These arrangements do not remove political conflict, but they limit the exposure of real projects to electoral swings and raise the cost of abrupt reversal.

For Brazil, the strategic implication is to treat diversification as insurance. Where sovereignty is directly at stake, including constitutional order, electoral governance, and judicial independence, containment is unavoidable. Elsewhere, Brazil can pursue pragmatic engagement by grounding cooperation in areas where it brings enduring capabilities. Clean energy-based industrial inputs, critical minerals, and cooperation against environmental and organized crime all meet this test. In these domains, Brazil's value comes less from rhetorical affinity and more from assets that remain relevant regardless of who governs in Washington.

The central test facing democracies today is less about moral consistency than about operational credibility. Systems that can still build, deliver, and sustain material progress tend to keep political conflict within negotiable bounds. When they cannot, space opens for political alternatives that promise decisiveness while sidestepping accountability. The implications extend beyond domestic politics. In international cooperation, arrangements anchored in implementation, material interdependence, and shared delivery are more likely to be durable than those resting primarily on declarations of values. In a world of imperfect democracies, cooperation endures not by ignoring political instability, but by being designed to function under it. In this sense, international partnerships increasingly reflect the same standard that now shapes democratic legitimacy at home: the capacity to deliver. ■

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