

CEBRI **JOURNAL**
BRAZILIAN CENTER
FOR INTERNATIONAL
RELATIONS

BRAZIL BETWEEN TWO WESTS

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FELICIANO DE SÁ GUIMARÃES & HUSSEIN KALOUT

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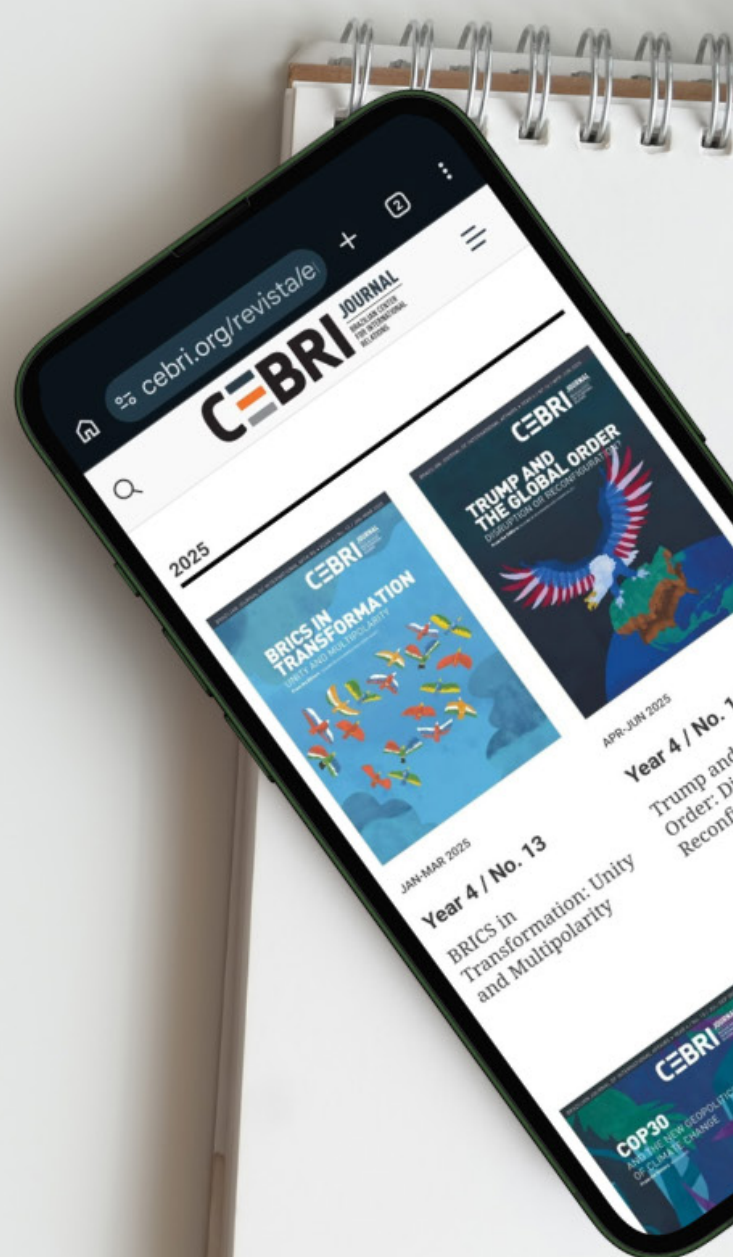




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Brazil Between Two Wests

Feliciano de Sá Guimarães & Hussein Kalout

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Brazil Between Two Wests

Feliciano de Sá Guimarães
Hussein Kalout

In Homer's *Odyssey*, Ulysses must navigate a narrow strait between Scylla and Charybdis, two dangers from which there is no perfect escape. To avoid one is to risk the other. Survival depends not on choosing sides, but on skill, prudence, and the capacity to move forward despite unavoidable constraints. Brazil today finds itself in a comparable position - situated between two versions of the West, that is, one anchored in the United States and the other in Europe. One, represented by the aggressiveness of President Trump's agenda, and the other, by trying to find its autonomous place in the world. Brazil must chart a course through an increasingly fragmented and contested order represented by this ongoing split between two versions of the West.

The title of this issue, *Brazil Between Two Wests*, captures more than a geographical or diplomatic positioning.

It reflects a deeper transformation in global politics. The transatlantic alliance that long structured Western cohesion has undergone visible strain, particularly during

The title of this issue, Brazil Between Two Wests, captures more than a geographical or diplomatic positioning. It reflects a deeper transformation in global politics.

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the Presidency of Donald Trump, when longstanding assumptions about shared values, institutional commitments, and strategic alignment were openly challenged. Differences over trade, technology regulation, security priorities, and the future of multilateralism continue to shape an evolving and less cohesive West.

At the same time, the posture adopted by the United States during the Trump Presidency can be interpreted as a departure from the normative foundations of the multilateral order. By privileging unilateral action, contesting multilateral institutions, and reframing international commitments in transactional terms, this approach evokes a more Hobbesian conception of international politics, one in which power prevails over rules, and legal constraints are subordinated to immediate national interest. For countries like Brazil, this shift raises important questions about the reliability of established norms and the risks associated with an increasingly law-fragmented global environment.

For Brazil, this fragmentation does not represent an anomaly, but rather a confirmation of a long-held view. Brazilian foreign policy has historically understood the international system not as a unified liberal order, but as a plural and fragmented environment composed of overlapping institutions, competing coalitions, and multiple normative frameworks. From this perspective, the current moment is less a rupture than an intensification of dynamics that have long defined global governance.

The metaphor of Ulysses is particularly apt because Brazil's challenge is not simply to avoid risks, but to actively navigate them.

This interpretation has important consequences. If the international order is inherently plural, then rigid alignments become less desirable and less effective. Brazil's diplomatic tradition has therefore emphasized autonomy, diversification of partnerships, and engagement across multiple institutional arenas. Rather than choosing between competing centers of power in the West or elsewhere, Brazil has sought to operate among them, expanding its room for maneuver while contributing to the construction of a more inclusive and diversified global order.

The metaphor of Ulysses is particularly apt because Brazil's challenge is not simply to avoid risks, but to actively navigate them. The United States remains a central partner, offering deep ties in areas such as technology, investment, and political cooperation. Europe, in turn, represents a crucial interlocutor in matters of trade, regulation, climate governance, and multilateral diplomacy. Both poles are essential, yet neither can fully define Brazil's international strategy.

The long-standing negotiations surrounding the EU-Mercosur Agreement offer a concrete illustration of both the potential and the limits of Europe as a partner for Brazil. On the one hand, the agreement reflects a shared commitment to trade liberalization, regulatory convergence, and environmental standards. On the other, its repeated delays and political contestation within Europe reveal the fragility of this commitment when confronted with domestic pressures and shifting priorities. For Brazil, the agreement thus embodies both opportunity and uncertainty, reinforcing the need to engage Europe pragmatically while avoiding overreliance on a partnership that remains contingent and politically contested.

Indeed, Europe has oscillated between defending the integrity of international law and accommodating its erosion through strategic silence or selective enforcement. While European actors frequently position themselves as guardians of multilateralism and normative order, their responses to breaches of international law have not always been consistent. This ambivalence reflects both internal divisions and the constraints imposed by geopolitical realities, but it also introduces uncertainty for partners such as Brazil, which must assess whether Europe can act as a stable normative anchor in a context of increasing global fragmentation.

The current international context makes this strategy both more necessary and more difficult. As geopolitical competition intensifies and pressures for alignment increase, the space for maneuver enjoyed by middle powers may narrow. In this environment, Brazil's long-standing emphasis on multilateralism, negotiation, and institutional engagement becomes a valuable asset.

The contributions gathered in this issue explore these dynamics from multiple perspectives, examining Brazil's relations with the United States and Europe in light of broader transformations in global order. Together, they suggest that Brazil's challenge is not to choose between two Wests, but to redefine its engagement with both in a way that preserves autonomy while advancing its national interests.

Like Ulysses, Brazil cannot avoid the strait. But it can choose how to navigate it. The path forward lies not in rigid alignment or strategic isolation, but in a pragmatic

The contributions gathered in this issue (...) suggest that Brazil's challenge is not to choose between two Wests, but to redefine its engagement with both in a way that preserves autonomy while advancing its national interests.

and flexible diplomacy capable of operating across divides. By embracing its position as a pivotal State and by leveraging the plurality of the international system, Brazil can transform a landscape of risks into a field of opportunities.

In a world no longer defined by a single center of power or a unified set of rules, the ability to navigate between Scylla and Charybdis may well become the defining skill of successful foreign policy. Brazil, if it remains faithful to its diplomatic tradition while adapting to new realities, is well positioned to master this art. 🇧🇷

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US dollar bill and Brazilian real banknotes. Image: Shutterstock.

Brasil e Estados Unidos em rumo de colisão?

Rubens Ricupero

Brasil e Estados Unidos em rumo de colisão?

Rubens Ricupero

Resumo: O texto revisita a história das relações bilaterais Brasil-EUA, do distanciamento imperial à aliança assimétrica e às tentativas de autonomia na Guerra Fria e no pós-1985. Conclui que, sob o segundo governo Trump, a relação virou colisão: interferências políticas e tarifas. Nesse cenário, o Brasil deve, em colaboração com outras potências médias, empenhar-se no reforço do multilateralismo

Palavras-chave: relações Brasil-EUA; política externa independente; tarifas comerciais; multilateralismo.

Brazil and the United States: On a Collision Course?

Abstract: The text traces Brazil–U.S. relations from imperial-era distance to an asymmetrical partnership, and later to bids for autonomy during the Cold War and after 1985. It argues that under Trump’s second administration, the relationship became a collision, driven by political interference and tariffs. In this scenario, Brazil should, in collaboration with other middle powers, work to strengthen multilateralism.

Keywords: Brazil-US relations; independent foreign policy; trade tariffs; multilateralism.

Não me recordo exatamente, mas acho que foi no primeiro semestre de 1993, alguns meses depois da posse de Bill Clinton como presidente. Eu era então embaixador nos Estados Unidos desde agosto de 1991, durante o primeiro e único mandato de George H. W. Bush (George Bush pai). Convidado a falar no Foreign Service Institute, em Arlington, uma espécie de Instituto Rio Branco para a formação de diplomatas, fui surpreendido pela primeira pergunta, assim que terminei a apresentação inicial: “Os Estados Unidos e o Brasil estariam condenados a entrar em colisão no futuro?”

Respondi que não via então nenhuma causa racional para um choque de interesses inconciliáveis, o que não é a mesma coisa que divergência de interesses ou maneiras de julgar situações. O principal objetivo brasileiro era, e continua a ser, o desenvolvimento que possibilite realizar o potencial do país. Não para acumular poder internacional, mas simplesmente para extirpar a miséria absoluta e a fome, flagelo ainda de milhões de brasileiros, reduzir a desigualdade e proporcionar a cada pessoa aquilo que a Declaração de Independência dos Estados Unidos definiu como a “busca da felicidade” – a possibilidade, não a garantia, de bem-estar e prosperidade. Agora, depois do profundo abalo causado pelo segundo governo Trump nas relações internacionais e bilaterais, provavelmente não daria resposta tão confiante no futuro.

Até a proclamação da República, a verdade é que os dois países se consideravam reciprocamente periféricos, não faltando atritos a um relacionamento marcado mais pela indiferença. A Corte, que decretou luto oficial na morte do herdeiro do Império Russo e da Rainha-Mãe da Holanda, recusou gesto similar quando foi assassinado o presidente Lincoln. Após sacudir na Regência o legado nefasto de Pedro I, que nos deixara com a Grã-Bretanha subordinação quase de semiprotetorado, o governo do Império manteve distanciamento em relação a britânicos e europeus, recusando assinar acordos comerciais com nações mais poderosas. Só começou a se distanciar dessa linha política após a proclamação da República, que daria início a uma aproximação com os Estados Unidos e os países latino-americanos. Um dos primeiros resultados visíveis da mudança foi a decisão de assinar com Washington o acordo comercial de 1891 (31 de janeiro de 1891).

Por ocasião da Revolta da Armada (1893-1894), em duas ocasiões a Marinha norte-americana interferiu em favor do governo republicano, ameaçado pelo bloqueio naval e bombardeio dos revoltosos. Poucos anos depois, o Barão do Rio

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Branco definiu uma estreita parceria assimétrica com a grande potência em ascensão que eram os Estados Unidos, sobretudo a partir de 1905, ano em que se tomou a decisão bilateral de elevar ao nível de embaixadas as missões diplomáticas em Washington e no Rio de Janeiro.

Único latino-americano fronteiro a três países europeus na era do imperialismo, o Brasil esperava dos norte-americanos da Doutrina Monroe proteção contra os imperialistas hegemônicos da época – ingleses, sobretudo, e franceses. Em troca, oferecia apoio à política norte-americana no Caribe, na América Central e na América Latina em geral, muitos de cujos países mantinham conosco problemas de fronteira para os quais desejávamos apoio ou neutralidade norte-americana.

Era acerto realista, em que ambos tínhamos algo a dar e que correspondia à realidade do comércio, no qual, desde cerca de 1870, os EUA tinham se tornado o principal mercado das exportações nacionais de café, borracha, cacau, representando 36% do total (1912). Mais tarde, os americanos suplantariam os britânicos e se converteriam nos maiores investidores em nossa economia, posição que ocupam até nossos dias.

Menos realista se mostrou o Barão ao contar com os americanos para promover em favor do Brasil junto às potências europeias um status mais alto do que o justificado pelas hierarquias de poder da época, logo se desiludindo na 2ª Conferência de Paz de Haia. Apesar dessas ilusões, Rio Branco construiu com Washington a “aliança não escrita”,

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que, de acordo com o Secretário de Estado Root em um discurso no Rio de Janeiro, consistia numa relação expressa: “*não em tratados formais e escritos de aliança, mas na universal simpatia, confiança e estima dos seus povos*”. Em outras palavras, o que importava era a percepção de que o Brasil, mais que outro país latino-americano qualquer, havia logrado estabelecer vínculos estreitos e especiais com os Estados Unidos.

Graças ao êxito, o paradigma diplomático criado por Rio Branco converteu-se de novidade em dogma imutável, a ponto tal que, décadas depois, Oswaldo Aranha afirmava em 1950 na Escola Superior de Guerra “*não convir para nós outra política senão a de apoiar os Estados Unidos no mundo em troca de seu apoio à nossa preeminência política, econômica e militar na América do Sul*” (Hilton 1994, 463).

Nesses termos crus, o ex-chanceler realçava realidade à qual, mais que qualquer outro, ele tinha concorrido a criar, primeiro em âmbito continental, ao liderar a Terceira Reunião Interamericana de Consulta (janeiro de 1942), no Rio de Janeiro, a fim de hipotecar solidariedade hemisférica (com exceção do Chile e da Argentina) aos americanos atacados em Pearl Harbor; logo em seguida, ao promover a aliança militar que levaria o Brasil a ser o único latino-americano a participar efetivamente ao lado dos EUA na Segunda Guerra Mundial.

Em contraste com a dubiedade argentina, o Brasil emergiria do conflito fortalecido no plano militar, prestigiado no político e dotado do começo da indústria pesada em Volta Redonda. Sairia também com a ilusão de se haver credenciado para desempenhar papel de relevo na reconstrução do mundo do pós-guerra, esperando tornar-se o “sexto membro permanente do Conselho de Segurança”, como se dizia então. Repetia o erro de exagerada expectativa de 25 anos antes, quando, favorecido pela proteção americana na Conferência de Paz de Paris do final da Primeira Guerra Mundial, chegou a acreditar que se tornaria membro permanente do Conselho da Sociedade das Nações.

Ao mesmo tempo, os dirigentes brasileiros se preparavam em 1946 para outra decepção ao julgar que merecíamos um Plano Marshall como os europeus, sem se dar conta da mudança de prioridades estratégicas. A fantasia custaria a se dissipar, voltando a ressurgir com JK sob a forma da Operação Pan-Americana (1958), esquema implausível para persuadir os conservadores do governo republicano de Eisenhower a destinar recursos públicos para os governos latino-americanos promoverem a industrialização e a infraestrutura.

As sucessivas decepções não bastaram para empurrar os meios dirigentes brasileiros ao neutralismo ou à oposição a Washington. Falou mais alto, no clima da Guerra Fria, a solidariedade de classe dominante com a Causa Ocidental, grafada assim mesmo com maiúsculas. Longe de ser considerado desdouro, o “alinhamento

automático” representava a defesa do autointeresse. Afinal, ao lutar no mundo contra a União Soviética, os americanos não faziam outra coisa que os conservadores brasileiros do governo Dutra ao combaterem a subversão comunista interna como ameaça existencial. Daí o papel que mais uma vez correspondeu ao Brasil como promotor na conferência de Quitandinha (1947) do Tratado Interamericano de Assistência Recíproca (TIAR), primeira de uma rede de alianças que culminaria na principal, a da OTAN, no Tratado de Washington (1949).

Alguma coisa, no entanto, se havia rompido, e o país deixaria de participar da Guerra da Coreia, iniciada em 1950. A progressiva erosão das expectativas gerou também solo propício para que, sob o influxo do nacionalismo (criação da Petrobras, por exemplo) e do marxismo ascendentes, começasse a ganhar corpo entre nós a visão dos Estados Unidos como personificação do imperialismo na ameaça à paz mundial. Nasce na carta-testamento do suicida Getúlio Vargas em 1954 nova mitologia, a de atribuir os males do povo brasileiro a “*decênios de domínio e espoliação dos grupos econômicos e financeiros internacionais*”, à “*campanha subterrânea dos grupos internacionais*” aliados a grupos nacionais, código que na época apontava aos poderosos ianques, já que os apagados europeus ou japoneses ainda se recuperavam dos estragos da Segunda Guerra Mundial.

Dessa conjunção de fatores, ou em oposição a eles, surgiu o primeiro cisma grave no seio dos meios sociais que sempre haviam ditado a política externa. Abandonando a presunção tácita de que os interesses estratégicos brasileiros coincidiam basicamente com os americanos e ocidentais, uma fração influente desses meios encontrou em Jânio Quadros o político capaz de sucesso eleitoral que permitiu o surgimento da Política Externa Independente (PEI), da qual o fiador e primeiro formulador foi o ministro das Relações Exteriores de Jânio, Afonso Arinos de Melo Franco. Sempre relativa a alguém ou alguma coisa, a independência da diplomacia no Brasil de 1961 era divergir dos Estados Unidos a respeito da Cuba de Fidel Castro, sustentar que nosso interesse estratégico não coincidia necessariamente com o norte-americano nesse tema crucial para a segurança hemisférica.

A partir daí, a divergência se estendeu a questões como os movimentos de libertação nacional nas colônias africanas, o comércio e vínculos econômicos com a URSS e o bloco comunista, o reconhecimento da China Popular, a ambivalência durante a crise dos mísseis em Cuba em 1962. Desenvolvida por San Tiago Dantas e Araújo Castro, a PEI se resumia, na essência, em recusar enxergar o mundo através do prisma da Guerra Fria. Nunca aceita ou tolerada por Washington, essa orientação externa será um dos fatores a levar o poderio norte-americano a ativamente encorajar e apoiar a conspiração para a derrubada de João Goulart e, em seguida, a ajudar os primeiros passos do regime militar de 1964 a 1967.

Nessa capacidade de influir para subverter os rumos da história brasileira, já testada em tom menor na Revolta da Armada em fins do século XIX, ressalta a diferença fundamental de poder que fez da relação Brasil-Estados Unidos a mais assimétrica e decisiva de todas as nossas relações diplomáticas.

Os primeiros três anos do regime militar, no governo Castello Branco, marcaram o apogeu da ajuda econômica americana e a volta do alinhamento da diplomacia na doutrina das “fronteiras ideológicas”, da ruptura com Havana, na intervenção na República Dominicana, na frase de Juracy Magalhães “o que é bom para os Estados Unidos é bom para o Brasil”, tradução popular da ideia da coincidência de interesses estratégicos – que não era bem assim começa a manifestar-se na desaprovação crescente de Washington aos rumos ditatoriais do regime; no término, em 1967, da ajuda econômica; na recusa do envio de tropas brasileiras ao Vietnã; no desacordo relativo à falta de adesão do Brasil ao Tratado de Não Proliferação Nuclear (1968); na condenação americana do AI-5.

Não obstante esses sinais de afastamento crescente, voltou a se impor, na primeira metade dos anos 1970, a colaboração contra Allende, no Chile, e outros desafios de esquerda, entre o repressivo governo Medici do “milagre econômico” e a dupla Nixon-Kissinger no poder em Washington. O infeliz improviso nixoniano “*as Brazil goes, so will go the rest of the Latin American continent*” (dezembro 1971) se complementava então na intensa relação epistolar de consulta entre Kissinger e o “dear Antonio”, seu correspondente, o ministro das Relações Exteriores Antonio Francisco Azeredo da Silveira. Tampouco durou essa ilusão de reencontro, destroçada pela chegada à Casa Branca de Jimmy Carter e sua campanha, depois de 1977, em favor dos direitos humanos e contra o Acordo Nuclear de Cooperação Brasil-Alemanha (1975).

Em reação, Geisel denunciou o acordo militar com os EUA. Já havia adotado, desde 1974, a diplomacia do “pragmatismo responsável” levada avante pelo ministro Silveira, que reatava, em certa medida, com o espírito da Política Externa Independente na afirmação de uma linha de autonomia em temas como o reconhecimento da independência de Angola e Moçambique, o estabelecimento de relações com Pequim, o distanciamento de Israel, a aprovação na ONU da resolução considerando o sionismo como racismo. Exceto um ou outro reajuste, como, posteriormente, a respeito da resolução antissionista, a linha de crescente afirmação da autonomia seria prosseguida no restante do regime militar.

Após a redemocratização de 1985, se consolidaria, nas suas linhas gerais, como a diplomacia de consenso para Tancredo, Sarney, Collor de Mello, Itamar. Atingiu talvez seu apogeu nos duplos mandatos de Fernando Henrique Cardoso (1995-2002) e Luiz Inácio Lula da Silva (2003-2010), obtendo prestígio e irradiação mundiais.

Com a desintegração da URSS em 15 novos países (1991), havia chegado ao fim o cataclismo geopolítico iniciado em outubro de 1989 com a derrubada do Muro de Berlim e o desaparecimento dos regimes comunistas na Europa Oriental e Central. A extinção da Guerra Fria eliminava o argumento que mais contribuía à tese da coincidência de interesses.

Pouco antes, já a política externa brasileira divergia da norte-americana em temas importantes. Por ocasião da invasão do Kuwait por Saddam Hussein, tínhamos declinado aderir à “coalition of the willing” liderada pelo governo do presidente George Bush pai, porque nosso interesse nacional priorizava o resgate das centenas de trabalhadores brasileiros da Mendes Júnior, detidos como reféns pelo tirano iraquiano. Não nos melindramos que a Argentina tivesse enviado dois navios de guerra e recebesse o título de um dos principais aliados dos EUA fora da OTAN.

Desde o episódio que narrei no Foreign Service Institute, passaram-se mais de 30 anos. A fase do poder unipolar dos Estados Unidos veio e se foi. A partir de meados da primeira década do século XXI, aí por volta de 2015, um pouco antes talvez, começa com Obama o desejo de mover o pêndulo estratégico em direção à China e à Ásia do Leste (“pivot to Asia”). Mais ou menos pela mesma época, em 2014, torna-se sempre mais nítido o desafio estratégico da Rússia, após a anexação da Crimeia e o apoio à secessão do Donbass. Inaugura-se etapa conflitiva e de alarmante erosão de normas e padrões do sistema internacional que evoca, por alguns traços, a Guerra Fria, ao menos na divisão do mundo em grupos hostis de alianças e aumento da militarização dos conflitos.

Nesse mesmo período de 30 anos, o Brasil evoluiu economicamente, conseguiu reconquistar um mínimo de estabilidade monetária, deixou para trás a fase da crônica ameaça de estrangulamento externo por meio do acúmulo de reservas, tornado possível pelo petróleo do pré-sal, e da diversificação de exportações de matérias-primas minerais e agrícolas. A redução da vulnerabilidade econômica externa se deveu, em grande parte, à demanda de commodities por parte da China e, cada

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vez mais também, da Ásia em seu conjunto. A nova realidade de um comércio exterior mais diversificado e voltado a países asiáticos (cerca de 50% do destino das exportações) e o conteúdo de produtos primários da demanda dos mercados ampliados não deixaram de trazer consequências nas opções diplomáticas.

Com efeito, enquanto se processava essa evolução brasileira, os interesses estratégicos norte-americanos ditavam mudanças acentuadas nas prioridades econômicas e de segurança. Superados os temores da época da Guerra Fria, Washington voltou a atenção a outras paragens conturbadas do planeta. Concentrou sua agenda latino-americana em temas como o das migrações e do narcotráfico e, durante alguns anos, na promoção de acordos de livre comércio, dos quais o símbolo foi a proposta da ALCA. O potencial dessa proposta jamais chegou a ser atrativo ou convincente para o Brasil e demais países do Cone Sul, sem as vantagens de contiguidade do México na indústria maquiladora ou similar. Além disso, eram concorrentes dos americanos na exportação de produtos agrícolas, para os quais as ofertas de acesso ao mercado da América do Norte foram inexistentes ou mínimas.

Mesmo essa fase de promoção de acordos de livre comércio, florescente no governo Clinton, se esvaiu aos poucos para dar lugar a uma realidade inédita na qual as administrações sucessivas de Trump e Biden se afastaram dos princípios do sistema multilateral de comércio que tinham criado e mantido no pós-guerra. Tem sido assombrosa, quase inacreditável, essa reviravolta para quem, como eu, teve de suportar durante a maior parte da Rodada Uruguai no GATT (fui o chefe da Missão do Brasil em Genebra e principal negociador brasileiro no GATT de 1987 a 1991) as pressões e recriminações a respeito de tudo – política industrial, proteção de empregos domésticos, desejo de manter a base industrial – o que os americanos execravam e hoje promovem ativamente.

Não lamento essa mudança, pois penso que, em muitos de seus aspectos, ela consistiu em adotar o que os países em desenvolvimento sempre desejaram: maior “policy space”, mais flexibilidade para seguir abertura gradual, espaço para promover setores nos quais se pode construir competitividade graças aos estímulos corretos.

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Foi pena que a volta ao poder de Donald Trump, numa segunda encarnação revista e piorada, tenha provocado um retrocesso lamentável tanto em matéria de valores e aspirações quanto em relação aos principais problemas mundiais, a começar pela “mãe de todas as ameaças” à sobrevivência das sociedades humanas – a questão do aquecimento global. A retirada pela segunda vez dos Estados Unidos do Acordo de Paris sobre o clima complica enormemente o combate já difícil ao aquecimento global, em véspera da COP30 em Belém. Não podendo mais contar com a colaboração americana, o Brasil, anfitrião do evento, e demais países engajados, como os da União Europeia, terão de redobrar esforços a fim de manter vivo o processo de construção do consenso climático.

O enfrentamento de outra das grandes ameaças globais, a das pandemias, sofreu também um golpe grave como resultado da decisão de Trump de retirar seu país da Organização Mundial de Saúde (OMS). A mesma atitude de questionar e enfraquecer as instituições e processos multilaterais coloca em risco o sistema internacional baseado em normas e em decisões tomadas democraticamente por diálogo e negociações. Tal como no caso do clima, a ação perniciosa do atual governo norte-americano terá de ser compensada pelo esforço redobrado dos demais em sentido contrário. Trata-se de um dos sérios desafios enfrentados nestes 80 anos de pós-guerra pela comunidade internacional.

No esforço de encaminhar soluções efetivas para as grandes questões reais – a fome mundial, a erradicação da miséria absoluta, a redução das desigualdades, a premência de atualizar as instituições multilaterais, a principiar pela ONU, seu Conselho de Segurança, às exigências de realidade desafiadora e cambiante – a visão de mundo do Brasil, sua perspectiva e sensibilidade se chocam com a visão ou interesses dos Estados Unidos de Trump. É evidente que nossa percepção do que representa a ascensão da China, por exemplo, ou nossa maneira de avaliar os conflitos do Oriente Médio, trarão a marca dos interesses nacionais brasileiros e de

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nossa aspiração por um papel à altura do peso específico do Brasil, de sua população, de sua tradição diplomática de atuação pacífica e original.

Mais do que nunca, o Brasil terá de concentrar sua capacidade de formulação e ação diplomática no esforço, junto com países similares, para defender um sistema internacional baseado nas normas e padrões da Carta das Nações Unidas, das grandes convenções de direitos humanos, meio ambiente, igualdade de gêneros, antirracismo, não discriminação. Em outras palavras, o que haverá de constituir a base sólida de nossa ação internacional provém do domínio dos valores e aspirações pelo avanço constante da consciência moral e ética da humanidade.

No relacionamento bilateral, estamos vivendo um dos momentos mais delicados em 200 anos. Ao longo dos seis primeiros meses de Trump 2, não houve diálogo direto em nível presidencial com Lula¹. Não se chegou a tentar viabilizar um encontro desse nível em razão dos riscos ponderáveis, decorrentes sobretudo da manifesta incompatibilidade entre os dois dirigentes e do imprevisível comportamento de Trump². Até junho de 2025, tinha-se a impressão de que o Brasil se situava fora do radar norte-americano. A baixa prioridade atribuída à relação bilateral também se refletia institucionalmente na ausência de designação oficial de novo embaixador para o Brasil³. A manutenção desse vácuo diplo-

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1. É marcante o contraste com outros poderes grandes e médios no sistema internacional – como China, Rússia, União Europeia, Japão, Índia, Canadá, México e Argentina – que já estabeleceram contatos diretos de alto nível – em geral, presidencial – por meio de encontros presenciais, ligações telefônicas ou tratativas diplomáticas.

2. Diante dos episódios constrangedores enfrentados por líderes da Ucrânia e da África do Sul em visitas oficiais à Casa Branca no primeiro semestre de 2025, o governo brasileiro tardou em pensar em um encontro presidencial bilateral.

3. Desde 21 de janeiro, a missão diplomática norte-americana em Brasília esteve sob a liderança de Gabriel Escobar, como encarregado de negócios após a saída da embaixadora Elizabeth Bagley.

mático sinalizava um descompasso entre os dois países e limitava o espaço para iniciativas estruturadas de cooperação.

Em 9 de julho de 2025, esse panorama sofreu imprevisível agravamento em decorrência de mensagem de Trump – via canais extraoficiais – que representou ingerência gratuita em assuntos políticos internos brasileiros. Na mensagem, o presidente norte-americano acusava o Judiciário brasileiro de perseguição política contra o ex-mandatário Jair Bolsonaro e de censura judicial contra redes sociais americanas. Sob a justificativa equivocada de corrigir inexistente déficit comercial, anunciava, ademais, a imposição de uma tarifa punitiva de 50% sobre as exportações brasileiras, com entrada em vigor a partir de 1º de agosto.

No dia 15 do mesmo mês, o governo de Washington resolveu investir contra supostas “práticas comerciais desleais” brasileiras, mediante a abertura de investigação com base na Seção 301 da Lei de Comércio. Mecanismo unilateral desprovido de controle imparcial como o dos processos da Organização Mundial do Comércio (OMC), esse gênero de investigação permite aos EUA agir como acusador e juiz em causa própria. Uma possível explicação para a escolha dessa ferramenta legal no caso brasileiro é que ela tenha sido uma resposta indireta às publicações de Paul Krugman, que questionou a autoridade legal do presidente americano para impor tarifas por razões políticas. Essas críticas podem ter alertado os assessores da Casa Branca sobre a fragilidade jurídica da medida inicial, levando-os a buscar na Seção 301 uma justificativa formal para as ações adotadas.

A verdade é que, ao contrário do alegado, os Estados Unidos acumularam um superávit de US\$ 410 bilhões no comércio com o Brasil nos últimos 15 anos (Brasil 2025). Se aplicada, a medida tarifária inviabilizará a maior parte da exportação brasileira ao mercado norte-americano. Trará, ao mesmo tempo, efeitos negativos para o setor privado americano, conforme assinalado pela Amcham e a U.S. Chamber⁴.

Em razão do desequilíbrio do intercâmbio bilateral em favor dos Estados Unidos, uma drástica redução provocada pelo “tarifaço” tenderá a afetar mais diretamente os interesses exportadores norte-americanos do que os brasileiros. O Brasil é atualmente o 15º principal parceiro comercial dos Estados Unidos, enquanto os Estados Unidos ocupam a 2ª posição entre os principais parceiros comerciais do Brasil (U.S. Department of Commerce 2025), o que evidencia a assimetria de dependência na relação bilateral.

4. Em nota divulgada em 15 de julho de 2025, a Amcham Brasil e a U.S. Chamber of Commerce alertaram para os impactos negativos das medidas sobre as cadeias produtivas e os consumidores norte-americanos, destacando que mais de 6.500 empresas seriam diretamente afetadas.

As medidas contra o Brasil configuram um caso singular em que a ameaça tarifária está diretamente vinculada a questões políticas e de soberania, como a suposta “perseguição” a Bolsonaro e decisões do STF relacionadas ao conteúdo nas redes sociais. Motivado possivelmente por figuras ligadas ao ex-presidente, como seu filho, o deputado Eduardo Bolsonaro, o episódio sinalizou o potencial de contaminação política nas relações bilaterais, elevando os riscos para o ambiente diplomático e gerando repercussões diretas no cenário político interno brasileiro, com potencial de duração até as eleições gerais de 2026.

Ao impor tarifas com o pretexto de defender o rival político do atual mandatário brasileiro e ao criticar o Poder Judiciário de um país soberano, Trump ultrapassou um limite grave nas relações internacionais. Não é a primeira vez que o presidente americano politiza o uso de tarifas: medidas tarifárias foram aplicadas contra o México, vinculadas à contenção da imigração; contra o Canadá, sob o argumento de segurança nacional; e até contra a Colômbia, como retaliação à recusa em receber deportados dos Estados Unidos (Council on Foreign Relations 2025).

Desde o anúncio das medidas contra o Brasil, o assunto vem passando por altos e baixos que ora animam a expectativa de que a racionalidade acabe por prevalecer, ora transmitem a impressão de que o panorama segue incerto e imprevisível. As negociações e acordos celebrados com vários parceiros – México, Coreia do Sul, União Europeia, a trégua de um ano com a China – permitem talvez um relativo e precário otimismo, no sentido de que exista algum espaço para reverter ou reduzir o impacto negativo das medidas.

Voltando, assim, à pergunta inicial, a melhor resposta possível, talvez mesmo a única, é que a colisão entre o Brasil e os Estados Unidos deixou de ser uma hipótese para se transformar em penosa realidade. Se estamos ou não “condenados” a permanecer no atual estado vai depender das negociações que se esboçam no momento em que concluo este artigo (1º de novembro de 2025).

Qualquer previsão é arriscada com interlocutor como Donald Trump, sujeito a caprichos e instabilidade emotiva e psicológica. Parece, portanto, improvável que se alcance um acordo definitivo que resolva todas as pendências e elimine incertezas até o fim do mandato. Quem sabe o máximo que se possa esperar será um cenário de “negociação permanente”.

1º de novembro de 2025

Pós-escrito

Terminado de escrever em 1º de novembro de 2025, este artigo permanece válido em suas análises e conclusões. De certa maneira, os dois meses e meio transcorridos serviram para confirmar e reforçar as tendências identificadas antes. Por exemplo, a nova Estratégia de Segurança Nacional dos Estados Unidos (U.S. National Security Strategy), datada de novembro de 2025, instituiu o chamado “Corolário Trump da Doutrina Monroe”, definido como a reafirmação e a imposição da referida doutrina no Hemisfério Ocidental. Sua aplicação mais espetacular foi o sequestro do presidente da Venezuela, Nicolás Maduro, e sua detenção nos Estados Unidos para ser julgado pela acusação de “narcoterrorismo”.

Com relação ao Brasil, parcela significativa da tarifa adicional de 40% foi mais tarde reduzida pelo próprio governo norte-americano. As exportações brasileiras para os Estados Unidos caíram 6,6% em 2025, totalizando US\$ 37,716 bilhões, em comparação com US\$ 40,368 bilhões em 2024. O recuo é atribuído às tarifas impostas pelo governo Trump. No mesmo período, as importações de produtos norte-americanos cresceram 11,3%, alcançando US\$ 45,246 bilhões, resultando em um déficit comercial de US\$ 7,530 bilhões para o Brasil. Prosseguem as negociações a respeito de adicionais reduções tarifárias. Um encontro pessoal entre Lula e Trump deve ocorrer na Casa Branca em 2026.

12 de janeiro de 2026 

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

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

Bruna Santos

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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Meeting during the 47th Summit of the Association of Southeast Asian Nations (ASEAN), in Kuala Lumpur, Malaysia. Photo: Ricardo Stuckert.



Power, Pragmatism and Upheaval: Lula, Trump and Brazil-US Relations
Cristina Soreanu Pecequilo

Power, Pragmatism and Upheaval: Lula, Trump and Brazil-US Relations

Cristina Soreanu Pecequilo

Abstract: In 2025, geopolitical and geoeconomic oscillations characterized Brazil-US relations in the context of Lula 3.0 and Donald J. Trump 2.0 administrations. In this scenario, the article's goal is to present a balance of bilateral diplomacy, arguing that there are continuous trends that affect the partnership, by exploring three dimensions. The first dimension is linked to the structural framework of power in which Brazil-US relations are inserted; the second is the analysis of the present time, and the third presents projections that are not final thoughts, but a potential roadmap of issues, opportunities and risks.

Keywords: bilateral diplomacy; Brazil-US; foreign policy.

Poder, pragmatismo e transformação: Lula, Trump e as relações Brasil-EUA

Resumo: Em 2025, as relações Brasil-Estados Unidos foram caracterizadas por oscilações geopolíticas e econômicas no contexto dos governos de Lula 3.0 e Donald J. Trump 2.0. Diante deste cenário, o objetivo do artigo é realizar um balanço da diplomacia bilateral, argumentando que existem tendências de continuidade que afetam a parceria explorando três dimensões. A primeira dimensão relaciona-se à estrutura de poder nas quais as relações Brasil-Estados Unidos estão inseridas; a segunda é a análise do tempo presente; e a terceira apresenta projeções que não são considerações finais, mas um mapeamento potencial de questões, oportunidades e riscos.

Palavras-Chave: diplomacia bilateral; Brasil-EUA; política externa.

In January 2025, when President Donald J. Trump took office for a second term, several polarized analyses of the future of Brazil-US bilateral relations under the government of Luiz Inácio Lula da Silva (2023-Current) from the Workers Party (PT) and its coalition of progressive forces were produced. For some, the revival of the Republican Presidency after Joe Biden's Democratic hiatus (2021-2024) was a doomsday. Trump 2.0 was not only a restoration of his first mandate (2017-2020), but its deepening. For others, Brazil would resume the course of a US-like-minded State, preparing the ground for a political overturn in 2026.

In short, none of these polarized views was correct. Trump and Lula were able to explore the essence of politics, which is pragmatism. Therefore, this article aims to present a balance of bilateral diplomacy in 2025, reflecting current agendas, but also trying to present a broader context of bilateral relations and its possibilities. The core argument of the article is that Brazil-US bilateral relations, present and future, are linked to continuous trends that cannot be disregarded as they are ingrained in Brazilian society and foreign realities of power.

In order to explore this reality, added to this introduction, the text develops its argument into three sections: in the first section – the structural framework of power – the idea is to put into context the broader characteristics of Brazil-US relations, by briefly making four assumptions regarding these relations and today's balance of world power. As this framework is built, the second section of the article focuses on the year 2025, and its comings and goings as Lula and Trump terms overlap, exploring international and domestic dynamics of both nations. The last section brings projections for 2026, that are mostly a potential roadmap of issues, opportunities and risks, rather than final thoughts.

THE STRUCTURAL FRAMEWORK OF POWER

Even though this is not a historical rendition of Brazil-US relations (Pecequillo 2025), but an essay on current agendas, four assumptions must be made. First, the US exerts structural influence on the nation's foreign policy and social, cultural, and economic development models, which define Brazil as part of the West. This influence affects the country, as its interest groups guide their positions, sometimes

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not based on concrete conditions but on assumptions about an either-or logic that aligning with the US produces benefits for Brazil.

Second, the US is still exercising its role as the world's hegemonic power, preventing the rise of challengers to its interests and strategic positions. The US acts as the world's balance of power holder, "engaging to contain" other nations. Third, despite remaining hegemonic, the US is facing domestic imbalances that challenge its power resources and the dynamics of interest groups that shape policy and decision-making.

Another source of pressure is the rise of emergent nations from the South, particularly China. These nations are sustaining effective coalitions such as the BRICS Plus, the Shanghai Cooperation Organization, and reorganizing their regional spaces and international projection. China's Belt and Road Initiative (BRI), its expansion beyond Eurasia, and the expansion of the Chinese system of international relations towards Africa, the Middle East, and Latin America offer alternatives to the West and the multilateral order. As a member of BRICS Plus, Brazil is one of these emergent nations, and China is one of its most relevant strategic and trade partners. As Hirst (2025) argues, Brazil-US bilateralism is directly affected by this transition of power. The scenario endures an unstable multipolarity (Visentini 2025), which leads to the fourth structural component.

In Brazil and Latin America, this structural framework goes even deeper as geopolitical conditions prevail, and the region is geographically located in the US influence sphere. The US would naturally act to restore its preferred alliances and conditions in the hemisphere if it perceives threats posed by regional or out-of-region players. This is a long-term tradition based on the 1823 Monroe Doctrine, which established these priorities in the 19th century. Although in the post-Cold War world some US governments mentioned that the Monroe Doctrine ended and was replaced by an era of cooperation, the Republican Presidency of George H. Bush (1989-1992), and the Democrat terms of Barack Obama (2009-2016) and Joe Biden (2021-2024), its geopolitical reality never ceased to exist.

Launched in November 2025, Trump's second term "National Security Strategy of the United States of America" (The White House 2025)¹ is a clear example of this. Breaking up a long-standing tradition that focused US attention on Eurasia, this document considers the Western Hemisphere as the US "priority". The other regions are the Indo-Pacific, Europe, the Middle East, and Africa. The US created the "Trump Corollary to the Monroe Doctrine". Although long, it is worth presenting a quotation that explores the core of this policy:

1. Referenced as NSS-2025, for simplicity's sake.

After years of neglect, the United States will reassert and enforce the Monroe Doctrine to restore American preeminence in the Western Hemisphere and to protect our homeland and our access to key geographies throughout the region. We will deny non-Hemispheric competitors the ability to position forces or other threatening capabilities, or to own or control strategically vital assets, in our Hemisphere. This “Trump Corollary” to the Monroe Doctrine is a common-sense and potent restoration of American power and priorities, consistent with American security interests. Our goals for the Western Hemisphere can be summarized as “Enlist and Expand.” We will enlist established friends in the Hemisphere to control migration, stop drug flows, and strengthen stability and security on land and sea. We will expand by cultivating and strengthening new partners while bolstering our own nation’s appeal as the Hemisphere’s economic and security partner of choice (The White House 2025, 15-16).

The Trump Corollary reinstates the logic of the former Roosevelt Corollary of 1904, when President Theodore Roosevelt declared that the Latin American region would be the focus of US political and military interference. At that time, the core issue was in the Caribbean Basin, extending into the Northern part of South America. In the 21st century, although the initial focus is the same, US military power and political influence are stronger in other parts of South America.

Since 2000, when democrat President Bill Clinton started the militarization of the fight against drug trafficking with Plan Colombia, followed by George W. Bush narcoterrorism agenda and the restructuring of US Southern Command (USSOUTHCOM) and the creation of the United States African Command (USAFRICOM) in 2008, US military presence was updated in the South American space, from the North to the South Atlantic. This was a response to the rise of the Pink Tide of progressive governments, as well as to China.

Over the last 20 years, China has become the most relevant trade partner for several Latin American countries, filling the US aid, trade, and development

The Trump Corollary reinstates the logic of the former Roosevelt Corollary of 1904, when President Theodore Roosevelt declared that the Latin American region would be the focus of US political and military interference.

cooperation vacuum. China is interested in the region's strategic resources, such as oil, rare earths, and critical minerals, as well as markets. Previously, Trump was already repositioning the US strategy in the Hemisphere. Dangers such as migration, organized crime and drug trafficking were present in strategic documents, added to the containment of external powers and local dangers (Venezuela, Cuba and Nicaragua). The priority was to enlarge the community of like-minded nations. There were also technological competition and trade wars within the North American Free Trade Agreement (NAFTA), which was updated as the USMCA (United States-Mexico-Canada) and a new project called Growth in the Americas.

Trump's Growth in the Americas was one of the first US initiatives aimed at regaining US influence in geoeconomics, followed by Biden's Americas Partnership for Economic Prosperity (APEP), which was unsuccessful. The US is unable to fully provide the kind of economic agenda that China does, not only in trade but also in infrastructure and investments. The arrival of the BRI in 2018 through the Community of Latin American and Caribbean States (CELAC) put additional pressure on US interests.

The US is unable to fully provide the kind of economic agenda that China does, not only in trade but also in infrastructure and investments. (...) This leads to an unprecedented US-China competition, and China is clearly the most significant concern for NSS-2025 in the “non-hemispheric competitors” category.

This leads to an unprecedented US-China competition, and China is clearly the most significant concern for NSS-2025 in the “non-hemispheric competitors” category. Brazil, as mentioned, is one of China's most relevant partners in South America and can be considered a “hemispheric competitor” when it pursues an autonomous foreign policy. How do these structural realities affect bilateral relations?

FROM THE GOOD NEIGHBOR DEMOCRAT TO THE YEAR OF PRAGMATISM (2025)

As Lula and Trump's terms overlap in 2025, it is possible to add some conjunctural elements to the previous structural framework. First, these terms

operate in different conditions: for Lula, who is entering the last half of his third mandate, Trump 2.0 had come as a pressing variable for its agenda, challenging prospects of re-election in 2026 (or, if Lula is not the candidate, the chances of a progressive force winning); in the US, 2025 marked the first year of Trump's second term, after he lost his re-election bid in 2020 amid the pandemic. Both Presidents were staging a comeback and had to prove themselves in polarized societies.

For Trump, an offensive political stance in both domestic and foreign contexts was essential, repeating the logic of his first mandate: breaking with his predecessor's policies and redefining priorities in areas such as the economy, migration, and foreign policy. Lula, on the other hand, was in a defensive position, as agendas were in place and running, whereas conditions changed abruptly. As the nation's international priorities were set for a situation where democrats would remain in the White House, the country needed to adapt to a more sensitive external environment. Regarding domestic impacts, there was growing concern that the far-right movement in Brazil would be reignited. For the players of the January 8, 2023 attempt to overthrow the democratic regime, who were in jail or still enduring trial, Trump's return to power was seen as a possible way out.

This would lead to Guimarães' (2025) argument that Brazilian diplomacy should adopt a "contain and engage" strategy across five axes: geopolitical, commercial, institutional/elections, regional, and technology/infrastructure. For this essay, we would resume these axes into three: geopolitical (geopolitical + regional), geoeconomic (commercial + technology and infrastructure), and geocultural (institutional/elections).

This strategy was put to the test in 2025 in three phases, and Brazil was able to both contain and engage the US: January-July, August-September and September-December. Although some may argue that the period is too short to be divided, one should remember that the pattern of Trump's Presidency is the "predictable

For Trump, an offensive political stance in both domestic and foreign contexts was essential, repeating the logic of his first mandate: breaking with his predecessor's policies and redefining priorities in areas such as the economy, migration, and foreign policy. Lula, on the other hand, was in a defensive position, as agendas were in place and running, whereas conditions changed abruptly.

unpredictability”. This pattern relies on rapidly changing conditions and policies to pressure others and gain ground for US priorities and demands. Nevertheless, this supposedly erratic behavior has a clear strategic logic of preserving US hegemony.

During the first phase, from January to July, Brazil-US relations were on hold. Trump’s main concern was to promote significant changes to Biden’s agenda on multilateralism, migration, human rights, and the environment. The idea of the good-neighbor policy, associated with the image of the “cordial democrat,” was also present in Brazil’s imaginary. One cannot guarantee that a Kamala Harris Presidency would be similar to Biden’s, but there was an expectation of continuity. Biden’s governmental actions in 2022-2023 helped sustain the democratic regime and restore stability. There was also a convergence towards universal rights and values.

Lula’s diplomatic bet on the revival of multilateralism and a strong protagonism represented by Brazil’s G20 Presidency in 2024 and the following ones in BRICS Plus, the Common Market of the South (Mercosur), and the Conference of the Parties (COP30) in the Amazon was naturally in check. Another effort that was pressed was Brazil’s attempt to rebuild South American integration projects as the Union of South American Nations (UNASUR). MERCOSUR and CELAC were also experiencing difficulties due to the South American political crisis. Although several hypotheses about a new Pink Tide or a Conservative Tide were presented, constant changes in alliances and divided election results led to no clear “tides” at all.

Even with the launch of the US trade war on April 2, the “Liberation Day”, Brazil was still somewhat flying under the radar of the US geoeconomic agenda, as import tariffs were set at 10%. There was great relief among interest groups in Brazil, as local exports were essential for keeping commodity prices low (bovine meat, fish, coffee, orange juice, to mention a few) in the US, and this was mostly because the US already had a trade surplus with Brazil. Other exports were of medium- and high-value manufactured products, such as diverse machinery (airplanes, compressors, mechanical parts), shoes, and steel. Brazilian imports were also relevant for the US trade balance and its surplus (gas, oil, machinery, pharmaceutical products and medicine). From an economic point of view, there was no benefit to the US in raising tariffs.

Some tensions, regarding the BRICS, the process of de-dollarization and the Brazil-China partnership were present. Conflicts regarding the regulation of social media and technology enterprises were already in place, inherited from Biden’s government. However, they reached new heights due to Elon Musk’s protagonism in the first months of Trump’s Presidency, when he served as head of the Department

of Government Efficiency (DOGE). There was a string of accusations of abuse of power by Brazil's Supreme Court, centered on Minister Alexandre Moraes.

Another source of tensions came from the geocultural side. Domestic forces in Brazil were constantly making use of Trump's pro-freedom speeches. One of former President Bolsonaro's sons, Eduardo Bolsonaro, moved to the US in March, as did other conservatives trying to escape Brazilian justice and, in their own words, organize the resistance against the left. There was a clear expectation that Trump would pressure Lula to stop the ongoing judicial process and free those who were already in jail.

At the end of July, all these factors combined led to the application of the Magnitsky Global Law towards Brazilian authorities and citizens. This law is a unilateral US measure created during Barack Obama's government and punishes foreign citizens who are accused of violating human rights and corruption crimes. The law works through economic sanctions applied to a chosen individual and involves suspending and prohibiting the issuance of US visas. For domestic groups, this measure was seen as an answer to the far-right pleas. This leads us to the second period: August-September.

Apart from this publicity struggle lies the most relevant issue: the government opted for professional diplomatic and technical talks, understanding the logic and limits of Trump's actions.

This two-month period, which ended with the brief meeting between Lula and Trump at the UN General Assembly on September 23, could be described as the worst of the year and the most difficult for Lula. Although Brazil was not heavily affected in the first phase of the trade war, from August onwards, a 50% tariff was imposed on Brazilian exports. This 50% tariff was not exclusively imposed on Brazil, but also on India. Trump's justification for applying this new tariff initially cited Brazil's judicial situation regarding its former President Bolsonaro (in India, they were linked to the country's bilateral relations with Russia and its stance on the Ukraine war).

This was not the only reason, as Trump's criticism of the BRICS economic agendas was constant. Other issues that were not so visible geopolitically were brought to light once more, such as Brazil's neutrality in Ukraine and its condemnation of Israeli actions in the Palestine issue and the Gaza Strip. The tariffs were the first movement of the Trump Corollary towards Brazil.

The tariffs ignited the far right, represented not only by Bolsonaro's inner circle but also by conservative governors in states such as São Paulo, Minas Gerais, Goiás, and Paraná, to name a few. Some of these states were heavily affected by the tariffs, particularly São Paulo, and the political leaders saw an opportunity to openly criticize Lula. These leaders, who were already known for praising the US and for wearing red Make America Great Again caps, openly asked Brasília to bend to US political demands.

However, Lula's government stood its ground and refused to concede to both US and domestic pressures. The defence of Brazil's sovereignty was at the core of the government's efforts, helping Lula gain greater popularity. In contrast to red MAGA caps, progressive forces spread the images of the blue cap "Brazil belongs to the Brazilians". Apart from this publicity struggle lies the most relevant issue: the government opted for professional diplomatic and technical talks, understanding the logic and limits of Trump's actions. The search for alternatives to the US markets accelerated, with China and other emerging markets deepening talks with the European Union and developing domestic policies to aid the sectors hit hardest. As the government showed serenity, the opposition tried to generate panic.

Brazilian exports in the commodity sector are relevant to keeping US prices low, and Trump values those who do not show weakness. The convergence of these realities enabled a positive adaptation on both sides and was evident in Lula and Trump's brief, seconds-long encounter at the UN, which marked the beginning of the third phase.

From September to December, with the launch of the NSS-2025 included, pragmatism had become the essence of politics. Lula and Trump held a bilateral meeting in October 2025 with positive geoeconomic effects. This meeting, with additional efforts by Vice President Geraldo Alckmin, also head of the Ministry of Development, Industry and Trade, and by Brazilian and American interest groups, resulted in a reduction in tariffs. A list of products, mostly food commodities, benefited from these talks, as US inflation was affected by Trump's trade war. Both countries were able to find a way through divergences, even without convergences, namely in the case of the Magnitsky Law, media regulation and Trump's former alliances with the Brazilian far-right. Accommodation does not mean the absence of clashes, but rather the possibility of their containment within diplomatic regular boundaries.

WHAT DOES 2026 HOLD? THE ERA OF UPHEAVAL

If 2025 ended on a positive note, embedded in pragmatism, 2026 began with signs of alert. On January 3, US military intervention in Venezuela for the ousting

of President Nicolás Maduro, due to accusations of narcoterrorism, occurred, in the context of the Trump Corollary. As this process is still ongoing, this article can only observe that, in Brazil-US relations, this intervention reinforced Brazil's concern about US unilateral actions in the Western Hemisphere.

Are other military interventions possible? Trump mentioned Colombia, but Cuba and Nicaragua could be targeted. In an era of upheaval, anything is possible as the 2020s are full of hot spots: Ukraine, Gaza, Yemen, the African continent, Taiwan, etc. Which are the most pressing issues for bilateral relations?

- a. Geoeconomic – The future steps of the trade agenda can present a new turnaround with additional US pressures. The year ended on a relatively stable note for some sectors, particularly commodities. In contrast, others linked to manufacturing are still in difficulties, seeking alternative markets, lower tariffs, or government compensation. Trade results from the last months of 2025 and the first period of 2026, after agreements to lower tariffs, are yet to be measured. Other issues that can affect Brazil include the impacts of US intervention in Venezuela on the oil market and broader agendas related to Trump's NSS-2025 priorities of reindustrialization, access to strategic supply chains (rare earth and critical materials), and the maintenance of US dominance in technological agendas and global tech facing China. The US would work hard to contain de-dollarization efforts, especially from the BRICS Plus and emerging nations.
- b. Geopolitically – After two years of a strong Brazilian multilateral offensive, the country will look more inward as the 2026 presidential election looms. Nevertheless, Brazilian commitments would still be sustained in BRICS, MERCOSUR, G20, COPs, and in South-South Cooperation. MERCOSUR-European Union would be relevant as well. The situation in South America would be more sensitive, and the lack of a cohesive political mechanism for integration will still leave the region less unified, in which Brazil is unable to regain its ground. Regarding bilateral relations, the US and China are the focus, as their competition would require Brazil to balance between them.
- c. Geocultural – The 2026 presidential election in Brazil in October and the US midterms in November are key. There is growing concern that,

politically, despite the current pragmatism in Lula-Trump relations, the US would support conservative forces. As of the US intervention in Venezuela, once more, these forces resumed their support for the US. Lula's official diplomatic position was correct, condemning the unilateral attack and violation of international rules. Some foreign policy issues will inevitably be in dispute in October. However, most of the population does not guide its vote by international affairs or support a deeper subordination to the US, focusing instead on economic and social policies. The same logic applies to the US midterms, but the MAGA core may scale back its support for Trump if there is an overemphasis on foreign intervention. Republicans want to maintain control of both the Senate and the House, and Trump will work to help them do so. The 2028 presidential election scenario is not that clear, as Trump is not running for re-election and potential candidates from both parties are in play.

International relations mirror pre-Second World War conditions, in which two poles were clashing (the US and Germany in that previous context): the US and China nowadays. Both are Brazil's main individual partners: the US in the three dimensions – geopolitical, geoeconomic and geocultural – and China focused on the geopolitical and geoeconomic agendas, but with less clout in the third aspect. However, this is a different hegemonic transition, as the US and China are strongly interdependent, with a higher risk of decoupling. So far, competitive coexistence prevails, but there is no process of de-risking this competition. On the contrary, it is escalating.

In an ideal scenario, Brazil could apply a bargaining foreign policy. In the real world, bargaining only works if there are two conditions: a consensual project of development and less vulnerability on one side, and a predisposition to negotiate on the other. It is doubtful that any of these conditions are present, as Trump envisions the preservation of assets such as US dollar dominance, technological advancement, and global projection, and China has already gained ground in several of these sectors, including its influence in the Western Hemisphere and in Brazil. This influence has spilled over and goes well beyond ideological narratives, and is ingrained in concrete agendas of trade, industry and infrastructure cooperation.

As the world transition accelerates, new spheres of influence evolve. Brazil must have its own vision to navigate this unstable multipolar balance of power.

For Brazil, Trump's strategic clarity is positive, as well as its flexible realism and state-to-state policies. An autonomous and sovereign, yet cautious and pragmatic, policy would guarantee a productive bilateral relationship. As the world transition accelerates, new spheres of influence evolve. Brazil must have its own vision to navigate this unstable multipolar balance of power. To paraphrase Trump, peace comes through strength, not submission, but never without dangers.

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"The World's Constable" (Puck magazine, Jan. 14, 1905). Theodore Roosevelt between Europe, Latin America, Asia and Africa holding a "Big Stick" labeled "The New Diplomacy". Image: Shutterstock.

The Monroe Doctrine in US-Latin American Relations

Leslie Bethell

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Abstract: The essay examines the origins of what became known as the Monroe Doctrine, in US President James Monroe's Address to Congress in December 1823, aimed at discouraging intervention by Spain and other European powers in the Western Hemisphere. After lying dormant for more than 70 years, it was invoked against Great Britain in the Anglo-Venezuelan crisis of 1895. It was then extended in the Roosevelt Corollary (1904), the Kennan Corollary (1950), the Reagan Corollary (1980) and now the Trump Corollary (2025) to justify, in varying circumstances, US intervention in Latin America.

Keywords: Monroe Doctrine; United States; Latin America; Western Hemisphere.

A Doutrina Monroe nas relações entre os EUA e a América Latina

Resumo: Este ensaio examina as origens do que ficou conhecido como Doutrina Monroe, no discurso do presidente dos EUA James Monroe ao Congresso, em dezembro de 1823, cujo objetivo era desencorajar a intervenção da Espanha e de outras potências europeias no Hemisfério Ocidental. Após permanecer adormecida por mais de 70 anos, foi invocada contra a Grã-Bretanha na crise anglo-venezuelana de 1895. Posteriormente, foi ampliada no Corolário Roosevelt (1904), no Corolário Kennan (1950), no Corolário Reagan (1980) e agora no Corolário Trump (2025) para justificar, em diferentes circunstâncias, a intervenção dos EUA na América Latina.

Palavras-chave: Doutrina Monroe; Estados Unidos; América Latina; Hemisfério Ocidental.

December 2023 marked the 200th anniversary of what became known as the Monroe Doctrine, the passages in US President James Monroe's Annual State of the Union Address to Congress (December 6, 1823), in which he declared that the United States would oppose any political intervention by a European power in the Western Hemisphere. The Monroe Doctrine, in its original formulation, was invoked in Secretary of State Olney's warning to Great Britain during the Anglo-Venezuelan crisis of 1895 and, by extension, to justify political intervention in the Western Hemisphere by the United States itself, in Roosevelt's Corollary (1904), Kennan's Corollary (1950), and Reagan's Corollary (1980). Absent since the end of the Cold War and the removal of any Soviet/Communist threat to Latin America which might demand US intervention, in November 2025 the Trump Corollary to the Monroe Doctrine was given a prominent place in the National Security Strategy of the second Trump administration. It was then invoked to justify US military intervention in Venezuela on January 3, 2026, threatened US interventions in Cuba, Mexico, Colombia and Panama, and even US annexation of Greenland. This essay examines the origins of the Monroe Doctrine and the role it had played in US-Latin American relations during the past two centuries.

The continental landmass on the other side of the Atlantic Ocean (or, if you prefer, the two landmasses joined at the isthmus of Panama), "discovered" by European navigators at the end of the 15th and beginning of the 16th centuries, was first given the name "America" in 1507: in a book entitled *Cosmographiae Introductio* by the Alsatian humanist and scholar Matthias Ringmann at the Gymnasium Vosagense in Saint-Dié-des-Vosges and in an engraved world map *Universalis Cosmographia* by his colleague the German cartographer Martin Waldseemüller. The name honored the Florentine navigator Amerigo Vespucci whose unreliable claim to have been the first to make landfall on the coast of what is now Venezuela in 1497, that is to say, before Columbus in 1498, was widely believed at the time (though not for long). The name America survived through use by later 16th century cartographers, notably Gerardus Mercator.

The continents of North and South America (from the middle of the 17th century also referred to as the "Western Hemisphere") were occupied and settled, and the indigenous ("Amerindian") populations conquered or subdued,

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first by the Spanish and Portuguese and then by the British and the French. *The History of the Discovery and Settlement of America* by the Scottish historian William Robertson (1777a, b), Principal of Edinburgh University for thirty years, was the first history of America, North and South. Its main focus was, however, on the Spanish Empire in America.

In 1776 the 13 English colonies on the eastern seaboard of North America declared their independence. Thomas Paine, in his pamphlet *Common Sense* (1776), was probably the first to suggest that the United Colonies of British North America should adopt the name United States of America. There was no debate, no formal resolution, the name emerged through use in drafts of the Declaration of Independence (June-July 1776), the Articles of Confederation (1777, ratified in 1781) and the Federal Constitution (1787, ratified 1789). Thus the United States appropriated for itself the name America. And the United States doubled its size with the Louisiana Purchase from France in 1803 and the absorption of Florida by treaty with Spain in 1819.

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In 1808 Thomas Jefferson, one of its Founding Fathers and the third President of the United States, welcomed the incipient revolutions for independence in Spanish America. The dissolution of the Spanish Empire in America would be a further step towards the eventual exclusion of all European influence from “this hemisphere” (the Western Hemisphere). America, the New World, would be totally independent of Europe, the Old World. In the following years, as the Spanish Americans fought for their independence, Jefferson and other prominent US politicians, notably Henry Clay, senator for Kentucky and later Speaker of the House of Representatives, elaborated the idea of an “American system”. It would be based on a special relationship between the peoples and governments of the Americas, a shared American geography and history, and shared American ideas of republicanism, liberty and democracy (sic). And Jefferson included Brazil, not independent from Portugal until 1822 and not to become a republic until 1889, as a key element in his “American system”.

John Quincy Adams, on the other hand, Secretary of State in both the Madison and the Monroe administrations (1817-25), while equally opposed to European influence in the Americas, had no interest in any “American system” which included

former Spanish and Portuguese colonies. They were, in his view, not only Iberian and, worse, Catholic, but inherently unstable and degenerate, unlikely to be able to establish and maintain free liberal institutions. “As to an American system”, Adams wrote, “we have it; we constitute the whole of it”. He had “little expectation of any beneficial result to this country [the United States] from any future connection with them [the newly independent Spanish and Portuguese speaking countries], political or commercial”.

By 1822 the United States was ready to recognize a number of *de facto* independent Spanish American republics. But there remained a concern that, having restored Ferdinand VII to absolute power in Spain, Bourbon France and the so-called Holy Alliance powers (Austria, Prussia and Russia) might even now attempt to restore Spanish power in America, which would in turn threaten the stability and security of the United States. In December 2, 1823, in his State of the Union Address to Congress, President James Monroe included a few paragraphs relevant to this issue which later in the 19th century became known as the Monroe Doctrine. Monroe declared that “the American continents (sic), by the free and independent condition which they have assumed and maintain, are henceforth not to be considered as subjects for colonization by any European powers”. Any attempt by a European power “to extend its political system to any portion of this hemisphere [the Western Hemisphere]” would be seen as “dangerous to [the] peace and safety [of the United States]”. We could not view any interposition for the purpose of oppressing them [the independent States of Spanish America] or controlling in any manner their destiny, by any European power in any other light than as the manifestation of an unfriendly disposition toward the United States”.

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This was a rhetorical declaration. Monroe and his Secretary of State, John Quincy Adams, were well aware of the limits of US power. The United States

had no capacity to defend the new “American nations” against hostile European powers. But they also knew that France was not seriously contemplating intervention in Spanish America. Even more important, as early as 1817 Britain had made it clear that the Royal Navy would not permit any European power to intervene on the side of Spain in the Spanish American revolutionary wars. By 1822 Britain was also preparing to recognize the *de facto* independent republics and protect its growing commercial and financial interests in Spanish America. In August 1823 George Canning, the British Foreign Secretary, had proposed to Richard Rush, the US minister in London, that Britain and the United States should jointly warn France and the other European powers off the Western Hemisphere. As President John F. Kennedy wrote in the speech he was due to give in Dallas on the day he was assassinated (November 22 1963): “It was not the Monroe Doctrine that kept all Europe away from the hemisphere—it was the strength of the British fleet and the width of the Atlantic Ocean” (Smith 1994, 112).

Canning realized that it was his proposal to Rush that had in part made it possible for Monroe to include his remarks on America and Europe in his Address to Congress. “The line of demarcation which I most dread”, Canning wrote in December 1823, “is America versus Europe. The United States naturally enough aims at this division!” But Britain’s overwhelmingly superior political, naval and commercial power ensured that, for the independent Spanish American States, British recognition was far more important than US recognition. “Spanish America is free and if we do not mismanage our affair she is English”, Canning wrote to Lord Granville, the British ambassador in Paris, in December 1824. “The United States have gotten the start on us in vain; and we link once more America to Europe”, he wrote to his friend John Hookham Frere in January 1825. With the recognition of its independence from Portugal mediated by the British in August 1825, Canning secured British political and economic preeminence in Brazil as well as in Spanish America. “And so behold!”, he wrote to Granville in November 1825, “the New World established and if we do not throw it away, ours” (Bethell 1970). In South America at least, the 19th century was the “English century”.

Simón Bolívar had a vision of a confederation of Spanish American republics forming a “single nation”. In December 1824 he invited representatives of “all the peoples and governments of America” to a Congress in Panama “to arrange our American affairs”. He did not, however, initially include the United States (which he felt should be kept at arm’s length), Haiti (former French colony independent in 1804), and Brazil (former Portuguese colony which had declared itself an independent Empire in 1822). The previously skeptical John Quincy Adams, from January 1825 sixth President of the United States, was now in favor of the United States taking a

leading role in hemispheric affairs. But when the United States was finally invited to Panama, it proved too late to send delegates. The Panama Congress, June-July 1826, was in any case a failure. Not all the Spanish American States sent delegates, and only Gran Colombia ratified the treaty of perpetual alliance. The idea of a Bolivarian American confederation persisted, however. American conferences were held in Lima (1847-8), Santiago de Chile (1856), Lima (1864-5) and Caracas (1883: the centenary of Bolívar's birth), but they also have to be counted as failures. And neither the United States nor Brazil was invited to participate. "[Both] are tacitly considered as not belonging to the American community", wrote the Brazilian *chargé d'affaires* in Santiago in May 1862, "and consequently excluded from it or, at most, only tolerated" (Santos 2003, 97).

For sixty years after Presidents James Monroe and John Quincy Adams, no US President showed much interest in the Western Hemisphere. The isolationists, led initially by Andrew Jackson, Adams's successor as President, won the battle against the American internationalists. The focus was the Manifest Destiny of the United States to expand its territory across the continent of North America to the Pacific. This was achieved through the annexation of

For sixty years after Presidents James Monroe and John Quincy Adams, no US President showed much interest in the Western Hemisphere. The isolationists, led initially by Andrew Jackson, Adams's successor as President, won the battle against the American internationalists. The focus was the Manifest Destiny of the United States to expand its territory across the continent of North America to the Pacific.

Texas in 1845 and the Mexican-American War (1846-8), as a result of which Mexico ceded to the United States over half its territory, including present-day California, Nevada, Utah, most of Arizona and parts of New Mexico. In warning against any meddling by the European powers in US expansion westward, President James K. Polk made brief reference to the Monroe Doctrine. But there was no invocation of the Doctrine against, for example, British and French intervention in the Rio de la Plata in the 1830s and 1840s, Spain's annexation of Santo Domingo 1861-5 and its wars with Peru (1864-6) and Chile (1865-6), and even, most significantly, the French occupation of Mexico (1861-7). The Lincoln administration did not recognize

Maximilian, installed as Emperor of Mexico by Napoleon III, and after the Civil War US military and diplomatic support for Juárez was a factor in persuading the French to withdraw. But the United States never explicitly argued that French intervention in Mexico was a violation of the Monroe Doctrine.

In the final decades of the 19th century, US governments began to show a new interest in the Western Hemisphere. The West was largely settled. The economy was booming and there was growing interest in trade with the countries South of the Rio Grande. There was also increasing concern that the “new imperialism” in Europe could pose a threat to the Hemisphere. James G. Blaine, US Secretary of State in 1881 and 1889-92, was largely responsible for the success of the International Conference of American States held in Washington D.C. (October 1889-April 1890). The United States invited the “nations of the Western Hemisphere”, the “nations of America”, including the Empire of Brazil (which became a republic in November 1889 during the Conference), to create an informal alliance. The Conference was to be followed by the negotiation of reciprocal tariff agreements to reduce trade barriers between the United States and the “Latin American nations”.¹

[...]in 1895, the Anglo-Venezuelan crisis over the frontier between Venezuela and British Guiana led to the first invocation of the Monroe Doctrine by the United States in decades.

Soon after, in 1895, the Anglo-Venezuelan crisis over the frontier between Venezuela and British Guiana led to the first invocation of the Monroe Doctrine by the United States in decades. Attempts to settle the dispute during the 1870s and 1880s had all failed. Venezuela increasingly appealed to US politicians and US public opinion for support. In October 1894 William Lindsay Scruggs, a former US minister to both Colombia and Venezuela, who was hired as a special agent by the Venezuelan government, published a pamphlet entitled *British Aggression in Venezuela, or the Monroe Doctrine on Trial*, which proved extremely influential. It supported the Venezuelan claim to the territory in British Guiana west of the Essequibo river. It asserted that Britain was trying to increase its territory by gaining control of the mouth of the Orinoco. The acquisition of new territory in the Western Hemisphere

1. *Reciprocity Treaties with Latin America*, a document presented to Congress in June 1890, with a message from President Benjamin Harrison and a letter from Secretary of State James G. Blaine, was the earliest official use of the term “Latin America” in English—from the Spanish “América latina” but including Brazil. See Leslie Bethell, *The Evolution of the Concept “Latin America” in the United States, from the Late 19th Century to the Second World War* (unpublished paper).

by a European power was a clear violation of the Monroe Doctrine. If the United States allowed Britain to consolidate and expand its territory, other European powers would follow. Africa was already being partitioned by the European powers. South America would be next.

President Grover Cleveland, who was generally against foreign entanglements, came under pressure from Theodore Roosevelt, Henry Cabot Lodge and others demanding a more assertive foreign policy and, in the case of Venezuela, a reaffirmation of the Monroe Doctrine, but a more “manly (sic)” Monroe Doctrine transformed into a symbol and instrument of American control of “our Hemisphere”. On July 20 Secretary of State Richard Olney wrote to the US ambassador in London with a message for Lord Salisbury, British Prime Minister and Foreign Secretary: “Today the United States is practically sovereign on this continent, and its fiat is law (...). Why? [because] its infinite resources combined with its isolated position render it (...) practically invulnerable as against any or all other powers”; any permanent union between a European and an American State was “unnatural and inexpedient”; and Britain should agree to submit the Venezuela/British Guiana boundary dispute “in its entirety” to arbitration. At the same time Olney was eager to underline “the precise scope and limitations” of the Monroe Doctrine: “It does not establish any general protectorate by the United States over the other American States (...). It does not contemplate any interference in the internal affairs of any American State(...). It does not justify any attempt on our part to change the established form of government of any American State”. It simply opposed European colonization and European political intervention in the Western Hemisphere. “The Monroe

[...]concerned over imperial overstretch in Africa and Asia, problems in South Africa, and the German naval challenge, the British government retreated, and in January 1896 accepted that the United States had a right to involve itself in the Anglo-Venezuela dispute over British Guiana and agreed to international arbitration. It is often argued that this represented the moment when Great Britain ceded political, if not yet economic, hegemony in Latin America to the United States.

Doctrine was never so carefully defined and so narrowly restricted as in the second Cleveland administration”, Olney later wrote (Sexton 2011, 210).

Lord Salisbury and Joseph Chamberlain, the British Colonial Secretary, flatly rejected US claims under the Monroe Doctrine and in particular the demand that the boundaries of British Guiana should be submitted to arbitration. A Colonial Office memorandum rejected “the bogus claims of Venezuela to the greater part of a British Colony”. The Law Officers found Olney’s interpretation of the Monroe Doctrine “absolutely incompatible with International Law”. However, Salisbury’s reply to Olney arrived after President Cleveland’s Annual Address to Congress (drafted by Olney) on December 17, in which he strongly reaffirmed the validity of the Monroe Doctrine and its application to the Anglo-Venezuelan dispute and asked Congress to appropriate funds for a Boundary Commission to settle the dispute. Any decision on land deemed to belong to Venezuela would, he said, be enforced regardless of any British objections. Any aggression by Britain in defense of its claims would be resisted.

Salisbury and his colleagues were shocked by Cleveland’s language. There were prominent figures in Britain as well as in the United States seeking confrontation. There was even talk of war. But in the end, concerned over imperial overstretch in Africa and Asia, problems in South Africa, and the German naval challenge, the British government retreated, and in January 1896 accepted that the United States had a right to involve itself in the Anglo-Venezuela dispute over British Guiana and agreed to international arbitration. It is often argued that this represented the moment when Great Britain ceded political, if not yet economic, hegemony in Latin America to the United States. However, the Arbitration Tribunal (two judges appointed by Britain, two representing Venezuela chosen by the United States, and a fifth judge and President of the tribunal, a Russian jurist and diplomat) meeting in Paris in 1899 awarded 95 per cent of the disputed territory west of the Essequibo river to British Guiana (Bethell 2024).

In 1897, after war had been avoided in the Venezuela/British Guiana dispute, Theodore Roosevelt had written to a friend, “In strict confidence (...) I should welcome almost any war, for I think this country needs one”. He went on to play a prominent role in the War with Spain in 1898, in which the United States established a protectorate over a newly independent Cuba and annexed Puerto Rico.² Roosevelt became President after the assassination of President McKinley in September 1901. In October, in his instructions to the US delegates to the second International Conference of American States to be held in Mexico City, he expressed

2. US involvement in Panama’s revolution for separation from Colombia in 1903 left the United States also with sovereignty over the Canal Zone.

the desire of the United States to be “the friend of all the Latin-American republics and the enemy of none”. But there were problems on the horizon. Instability and an unwillingness to honor debts in a number of countries, notably the Dominican Republic and Venezuela, were inviting intervention by European powers, including Germany, a rising economic and naval power. The Anglo-Italian-German blockade of Venezuela in 1902 led Luis Maria Drago, the foreign minister of Argentina, to propose that the American States should jointly declare that a country’s failure to fulfil treaty obligations and repay its public debt did not justify military intervention or territorial occupation by a European power (sometimes called the Drago Doctrine). Roosevelt, however, had no interest in joint American declarations. The United States would unilaterally deal with hemispheric problems. In his fourth State of the Union Address to Congress on December 6, 1904, in a passage that became known as the Roosevelt Corollary to the Monroe Doctrine, Roosevelt declared: “All that this country desires is to see the neighboring countries stable, orderly, and prosperous. Any country whose people conduct themselves well can count upon our hearty friendship. If a nation shows that it knows how to act with reasonable efficiency and decency in social and political matters, if it keeps order and pays its obligations, it need fear no interference from the United States. However, chronic wrongdoing, or an impotence which results in a general loosening of the ties of civilized society, may in America, as elsewhere, ultimately require intervention by some civilized nation, and in the Western Hemisphere the adherence of the United States to the Monroe Doctrine may force the United States, however reluctantly, in flagrant cases of such wrongdoing or impotence, to the exercise of an international police power”. In 1905 the United States intervened in the Dominican Republic to take over the customs in order to guarantee payment to foreign creditors.

The Monroe Doctrine had become explicitly an instrument of US intervention in Latin America. In 1906, at the third Inter-American Conference in Rio de Janeiro, Elihu Root, Secretary of State in Roosevelt’s second administration, underlined that US intervention was a last resort. And there had been no reference to occupation by the United States in Roosevelt’s Address to Congress in December 1904. In his Address in 1906, Roosevelt declared: “In many parts of South America (sic) there has been much misunderstanding of the attitude and purposes of the United States toward the other American republics. An idea has become prevalent that our assertion of the Monroe Doctrine implied or carried with it an assumption of superiority and of a right to exercise some sort of protectorate over the countries

to whose territory that doctrine applies. Nothing could be further from the truth.”³ Nevertheless, the United States occupied Nicaragua (1912-33), Haiti (1915-34) and the Dominican Republic (1916-24). At the Inter-American Conferences in Buenos Aires (1910), Santiago de Chile (1923) and Havana (1928), the Spanish American delegates (though not the Brazilians, who generally supported the United States) took every opportunity to denounce the new US imperialism.

In the aftermath of the disastrous Pan-American Conference held in Havana in 1928, which highlighted the alarmingly poor state of the United States' relations with its neighbors, including now those in South America where US trade and investments had grown considerably since the First World War, President-elect Herbert Hoover made a ten-week goodwill visit to ten Latin American countries. He made 25 speeches in which he pledged that the United States would in future act as a “good neighbor” and, in particular, abstain from armed intervention and occupation. J Reuben Clark, a State Department lawyer and Under Secretary of State, wrote a memorandum at this time in which he reviewed the history of the Monroe Doctrine and concluded that it provided no justification for US intervention in the internal affairs of another American State, and that therefore the Roosevelt Corollary was not an authoritative interpretation of Monroe Doctrine. Secretary of State Frank B. Kellogg, in February 1929, sent a draft circular to all US diplomatic posts in Latin America: “The Monroe Doctrine has nothing whatsoever to do with the domestic concerns or policies or forms of government or the international conduct of the peoples of this Hemisphere (...) The principles of the Monroe Doctrine become operative only when some European power (...) undertakes to subvert or exclude the self-determined form of government of one of these Republics or acquire from them all or part of their territory (...). The Monroe Doctrine is not now and never was an instrument of aggression; it is and always has been a cloak of protection. The Doctrine is not a lance; it is a shield”.

In the 1930s, the United States faced an external threat to its economic and geo-political interests in Latin America from the emerging fascist powers of Europe. Germany in particular was seen as a threat in Argentina, Chile and Brazil.⁴ The administration of Franklin D. Roosevelt responded by reaffirming a Good Neighbor Policy towards Latin America, emphasizing the importance of inter-

3. Speaking in Washington on his return from the Paris Peace Conference in 1919, President Woodrow Wilson said: “I tried while I was in Paris to get it [the Monroe Doctrine] written into the document [the Covenant of the League of Nations], but I will confidentially tell you that when I tried to define it I found that it escaped analysis”. The final version of the Covenant included the statement: “Nothing in the Covenant shall be interpreted as impairing the validity of the Monroe Doctrine”.

4. Curiously, Hitler and Nazi officials, borrowing from Carl Schmitt's concept of *Grossraum* (great space), often spoke of the need for a “German Monroe Doctrine” to exclude alien powers from Europe (Britain and France from Central and Eastern Europe, the “Anglo-Saxon powers” from Europe as a whole).

American solidarity against fascism. In a series of meetings of American Foreign Ministers in Panama (September 1939), Havana (July 1940) and finally Rio de Janeiro (January 1942), after the United States had entered the Second World War following the Japanese attack on Pearl Harbor, the United States succeeded in securing the support of Latin America (all the States except Argentina) in a united front against the Axis powers (Germany, Japan and Italy). The Second World War marked the high point of hemispheric solidarity, inter-American cooperation, closer relations—political, military, economic and cultural—between the United States and Latin America, especially Brazil.

In the immediate aftermath of the Second World War, Latin America remained important to the United States for both economic (trade and investment) and geopolitical (security) reasons, and not least because it initially represented the biggest single voting bloc in the UN Assembly. But hemispheric increasingly gave way to global interests and concerns. Europe, the Middle East and Asia became more important than Latin America. There was, for example, no economic development aid for Latin America.⁵ A staff paper on the main foreign policy objectives of the United States, prepared for President Harry S. Truman's Secretary of State Dean Acheson by the State Department Policy Planning Staff (SDPPS) in February 1948, had no chapter on Latin America. In 1949 Adolf Berle, a former Assistant Secretary of State and former US ambassador to Brazil, complained about the "sheer neglect and ignorance" of the region he found in Washington. "We have simply forgotten about Latin America" (Schwarz 1987, 312). This was, however, about to change. A secret memorandum of March 29, 1950 on "Latin America as a problem in United States foreign policy" by George F. Kennan, a senior American diplomat, foreign policy intellectual and Director of the SDPPS, which came to be known as the Kennan Corollary to the Monroe Doctrine, warned that the USSR posed a significant challenge to US hegemony in Latin America and that communism was a clear and present danger throughout the region. The stage was set for a series of US interventions in Latin America during the Cold War: Guatemala in 1954, Cuba in 1961-2, Brazil in 1964, the Dominican Republic in 1965, Chile in 1973, Grenada in 1983, Nicaragua and El Salvador throughout the 1980s, Panama in 1989 (though the US invasion to depose Manuel Noriega was primarily drug related).

At the 10th Inter-American Conference in Caracas in 1954, Secretary of State John Foster Dulles explained the need to overthrow the Arbenz government

5. At a press conference in Washington in August 1947, President Truman claimed: "There has always been a Marshall Plan in effect for Latin America. [It is] known as the Monroe Doctrine!" (Smith 1994, 62).

in Guatemala in terms of the Monroe Doctrine. The Bay of Pigs fiasco (April 1961) and the Cuban missile crisis (1962) also generated numerous references to the Monroe Doctrine. At a press conference in August 1962, President Kennedy said: “The Monroe Doctrine means what it has meant since President Monroe and John Quincy Adams enunciated it, and that is that we would oppose a foreign power extending its power to the Western Hemisphere, and that is why we oppose what is happening in Cuba today”. A *Time* cover story (September 17, 1963) was headed “The Monroe Doctrine and Communist Cuba”; and *Life* magazine (September 21, 1963) called the Cuban crisis “the most direct challenge to Monroe Doctrine since Maximilian invaded Mexico”. In 1981 in an article in the *National Review* (“The Monroe Doctrine, I presume?”, April 17, 1981) William Buckley Jr. wrote that Ronald Reagan’s re-baptism of the Monroe Doctrine—the Reagan Corollary to the Monroe Doctrine—to justify US armed assistance to insurgencies aimed at the overthrow of “Communist” regimes in Latin America, especially Central America—was “nothing less than a spiritual experience”.

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There is no reference to
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is on political control and
economic exploitation of
the Western Hemisphere
through the exercise of
US military power.*

The end of the Cold War and, therefore, the Soviet/Communist threat to Latin America had removed the principal motive and justification for US intervention in Latin America. At a meeting of the Organization of American States (OAS) in November 2013, John Kerry, President Obama’s Secretary of State, announced: “The relationship that we seek and that we have worked hard to foster is not about a US declaration about how and when it will intervene in the affairs of other American nations. It’s about all of our countries viewing one another as equals. The era of the Monroe Doctrine is over”. And so it was, until the election of Donald J. Trump as President of the United States.

Throughout his first administration (2017-21) President Trump and successive Secretaries of State made frequent reference to the Monroe Doctrine and, as early as August 2017, threatened military invasion of Venezuela under its umbrella. In describing the administration's policy in the Americas, John Bolton, Trump's National Security Advisor, was quoted in the *Washington Post* (Kessler 2019) as saying "In this administration, we're not afraid to use the word Monroe Doctrine...It's been the objective of US presidents going back to President Ronald Reagan to have a completely democratic hemisphere". Bolton wrote in his White House memoir *The Room Where It Happened* (2020) that Trump thought invading Venezuela would be "cool" and that Venezuela was in any case "really part of the United States".

At the outset of the second Trump administration in 2025 there was again much discussion of the Monroe Doctrine. The *Washington Post*, for example, carried an article with the heading "Trump revives the Monroe Doctrine in US relations with the Western Hemisphere" (DeYoung 2025). In November 2025 the administration finally released its National Security Strategy document and it gave special emphasis to the strategic importance of the Western Hemisphere. The United States wanted to ensure that the Hemisphere remained "reasonably stable and well governed" to discourage mass migration and drug trafficking to the United States but mainly to guarantee US access to "key strategic locations" and prevent "hostile foreign incursion or ownership of key assets": "We will deny non-hemispheric competitors [i.e. principally China] the ability (...) to own or control strategically vital assets in our Hemisphere". After years of neglect the United States would "assert and enforce a 'Trump Corollary' to the Monroe Doctrine" in order to "restore American [i.e., U.S.] pre-eminence in the Western Hemisphere". There is no reference to shared values, democracy or human rights. The focus is on political control and economic exploitation of the Western Hemisphere through the exercise of US military power. There would be a predisposition to non-intervention, the document claims, but "rigid adherence to non-intervention is not possible".

On January 3, 2026, in contravention of article 2 of the UN Charter and of the US Constitution, the United States invaded Venezuela and abducted President Nicolás Maduro and his wife Cilia Flores. There were various justifications offered. Some were spurious—the export of drugs from Venezuela to the United States, migration from Venezuela to the United States, Venezuelan narco-terrorism in the United States. Others were more pertinent—the Venezuelan regime's alignment with US adversaries (Russia, China, Iran, North Korea), and the growing presence of Russia and China in Venezuela. Above all, the United States sought to "take

back” Venezuela’s huge reserves of oil and exploit Venezuela’s “minerals of the future” (a clear case of US resource imperialism).⁶

At the press conference that followed the military intervention in Venezuela, Trump declared “The Monroe Doctrine is a big deal. But we’ve superseded it by a lot. By a real lot. They now call it the Donroe Doctrine (sic). (...) Under our new National Security Strategy, American [US] dominance in the Western Hemisphere will never be questioned again”. For Defense Secretary Pete Hegseth, the Monroe Doctrine was “back and in full effect”. The United States, Trump announced, would “run” Venezuela (from Washington?), provide political stability and, by reviving its oil industry, deliver economic prosperity (there was no reference to democracy). Trump also threatened Cuba, Colombia and Mexico with intervention. Secretary of State Marco Rubio predicted that ending the supply of Venezuelan oil would destabilize and eventually bring down the Communist regime in Cuba (for him personally, the primary objective of the Venezuelan adventure).

Trump had already argued many times that the United States would take back full sovereignty over the Panama Canal Zone (returned to Panama by President Carter in 1979) and that Canada should become the 51st State (Trump’s nominee as ambassador to Iceland “joked” that Iceland should become the 52nd state). At the press conference on January 3, Trump repeated his claim that for reasons of national security Greenland, a semi-autonomous territory of Denmark, a NATO ally, should and would belong to the United States, taken if necessary by force. Jeff Landry, governor of Louisiana, appointed US special envoy to Greenland, declared: “They [the folks in Greenland] are in the Western Hemisphere. It [Greenland] fits inside the Monroe Doctrine”. On January 5 the US State Department released a poster with, over an image of Trump, the slogan: “This is OUR Hemisphere”.⁷ 🇺🇸

6. At the time of writing these Notes (15-20 January 2026) no-one seemed to have drawn Trump’s attention to the fact that, despite international arbitration in 1899 awarding most of the disputed territory west of the Essequibo river to British Guiana, Venezuela has maintained its long standing claim to the territory, which is today two thirds of Guyana, an independent State since 1966. See Leslie Bethell (2024) *Notes on the History of the Venezuela/Guyana Boundary Dispute*. In 2015, Exxon Mobil discovered significant oil reserves offshore Essequibo, and Guyana has since experienced an economic boom. In April 2024, Maduro declared Essequibo a Venezuelan state (Guyana Esequiba) and threatened to occupy it by force. The United States does not have a defense treaty with Guyana, but it does have a military cooperation agreement. It was expected at the time to give its support to Guyana, a member of the Organization of American States, in the unlikely event of invasion by Venezuela. Now that the United States in effect owns Venezuela, mainly for its oil and mineral resources, will Trump be tempted to support Venezuela’s claim to Essequibo?

7. A Memorandum on national defense strategy from the Department of War to top officials in the Pentagon and the military high command (January 23rd, 2026) included the following: “They [our nation’s post-Cold War leadership and foreign policy establishment] forgot the wisdom of the Monroe Doctrine [and] ceded influence in our hemisphere (...). We will actively and fearlessly defend America’s interests throughout the Western Hemisphere (...). This is the Trump Corollary to the Monroe Doctrine, and America’s military stands ready to enforce it with speed, power and precision. The United States will no longer cede access to or influence over key terrain in the Western Hemisphere (...). We will ensure that the Monroe Doctrine is upheld in our time.”

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Brazilian flag puzzle on US dollar banknote. Image: Shutterstock.

Managing Volatility in United States-Brazil Relations:
Security Cooperation and Critical Minerals as Stabilizers
Robert Muggah

Managing Volatility in United States-Brazil Relations: Security Cooperation and Critical Minerals as Stabilizers

Robert Muggah

Abstract: This article analyzes the reconfiguration of US hemispheric policy in 2025-2026 and its implications for Brazil. It argues that the second Trump administration securitized trade and supply chains through tariffs as instruments of political coercion, reinforcing Brazil's elite consensus around strategic autonomy. The article explores concrete avenues for cooperation in security and critical minerals, concluding that bilateral relations are likely to be characterized by managed volatility rather than alignment or rupture.

Keywords: US hemispheric policy; Brazil-US relations; tariffs as statecraft; strategic autonomy; critical minerals.

Gerenciando a volatilidade nas relações Estados Unidos-Brasil: cooperação em segurança e minerais críticos como vetores de estabilização

Resumo: Este artigo analisa a reconfiguração da política hemisférica dos Estados Unidos em 2025-2026 e suas implicações para o Brasil. Argumenta-se que o segundo governo Trump securitizou o comércio e as cadeias de suprimento por meio do uso de tarifas como instrumentos de coerção política, reforçando o consenso das elites brasileiras em torno da autonomia estratégica. O artigo explora vias concretas de cooperação nas áreas de segurança e de minerais críticos, concluindo que as relações bilaterais tendem a ser marcadas por volatilidade administrada, e não por alinhamento ou ruptura.

Palavras-chave: política hemisférica dos EUA; relações Brasil-EUA; tarifas como estratégia de Estado; autonomia estratégica; minerais críticos.

Since 2025, the reconfiguration of United States hemispheric policy has reshaped relations with Brazil by turning economic instruments into tools of political leverage. The second Trump administration has increasingly framed the region through a homeland security and supply chain resilience lens, using tariffs and related measures less as residual trade remedies and more as coercive statecraft. The 2025 tariff episode with Brazil crystallized this shift. A dispute that might once have remained within trade channels became a sovereignty confrontation when Washington tied economic penalties to Brazil's domestic political and judicial trajectory, prompting rapid Brazilian counter-mobilization and consolidating elite consensus around strategic autonomy.

Despite recurrent friction, the relationship is settling into selective cooperation where both governments can claim tangible gains while limiting domestic political exposure. The most resilient channels are those with operational deliverables, notably efforts against transnational organized crime and targeted engagement on critical minerals. Rare earths offer the most credible constructive agenda because they align Brazil's resource potential with United States priorities to diversify supply chains beyond Chinese processing and reduce strategic vulnerability. Even so, cooperation is likely to remain narrow, bounded by Brazil's sensitivity to perceived interference, the accelerating securitization of digital governance and platform regulation, and China's non-substitutable economic centrality as Brazil's largest trading partner. The most plausible 2026 outcome is managed volatility rather than alignment or rupture, with thin cooperation as the norm and episodic crisis management as the stabilizer.

The United States posture is anchored in a sharper fusion of domestic priorities with external instruments. The Trump administration's 2025 National Security Strategy places the region at the center of United States objectives, defining hemispheric stability in terms of migration control, countering cartels and transnational criminal organizations, preventing hostile ownership of strategic assets, and protecting critical supply chains (White House 2025a). In practice, this framing increases the salience of trade and financial levers as instruments of signaling and compliance, and privileges high visibility moves over slower institutional bargaining, tightening the coupling between domestic political incentives and foreign policy action.

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Brazil is the key test case for evaluating the reach and limits of the United States approach. It is simultaneously a major regional actor and a middle power with established doctrines of autonomy and multi-alignment. Its economic scale and diplomatic weight make durable punitive isolation difficult to sustain, while its institutional memory of external interference raises the domestic political costs of visible conditionality. The bilateral relationship is therefore better understood as bargaining under asymmetry and constraint than as a strategic partnership in the classical sense.

This article makes three interlocking arguments about the emerging pattern of United States-Brazil relations. First, the United States is normalizing coercive hemispheric statecraft through a broadened toolkit that includes the securitization of tariffs, expanded extraterritorial economic pressure, and the threat or use of military assets. Second, Brazil's response is less opposition to cooperation than resistance to coercion framed as interference in domestic institutions. Third, selective cooperation will persist where interests overlap and deliverables are measurable, especially in security cooperation and critical minerals, but the relationship will remain structurally volatile given China's economic centrality and politicized disputes over digital governance.

Brazil is the key test case for evaluating the reach and limits of the United States approach. It is simultaneously a major regional actor and a middle power with established doctrines of autonomy and multi-alignment. (...) The bilateral relationship is therefore better understood as bargaining under asymmetry and constraint than as a strategic partnership in the classical sense.

HEMISPHERIC POLICY RECENTERED ON DOMESTIC OBJECTIVES

The 2025 National Security Strategy and the 2026 National Defense Strategy recenter the Western Hemisphere as an extension of homeland governance and treat regional stability fundamentally linked to domestic security. The former prioritizes preventing mass migration, securing cooperation against cartels and transnational criminal organizations, protecting critical supply chains, and limiting hostile foreign incursions or ownership of strategic assets (White House 2025a). The latter reinforces this orientation by stressing defense of United States interests across the hemisphere, greater burden sharing for regional security, and accelerated investment

in the defense industrial base (US Department of War 2026). Read together, they imply that hemispheric policy will be judged against domestic measures of success, especially border pressure, narcotics flows, and visible enforcement outcomes.

This posture produces two systemic effects that shape both what Washington prioritizes and how it applies pressure across the hemisphere. The hemisphere becomes a preferred theater for assertive action because it can be justified as direct protection of the US domestic order. The second is instrument selection. Economic tools once treated as specialized instruments of trade or sanctions policy are reclassified as general purpose levers of coercion. In practice, this collapses the boundary between economic diplomacy and political conditionality, increasing uncertainty for regional governments and for private sector actors that depend on stable and predictable rules.

It also creates a premium on demonstration, privileging highly visible moves as political signals of control and resolve. Decisive action in the hemisphere becomes proof that coercion can produce outcomes, even when the broader external effects are ambiguous or destabilizing. How partners interpret the signal matters less than sustaining a domestic narrative of resolve and control. The strategic risk is path dependence. Precedent hardens into expectation, and measures initially presented as exceptional become normalized elements of routine statecraft.

FROM TRADE DISPUTE TO SOVEREIGNTY DISPUTE IN US-BRAZIL RELATIONS

The 2025 tariff crisis illustrates the political limits of coercion when directed at a large, autonomy-oriented partner. The United States announced 50% tariffs on Brazilian goods and explicitly linked them to Brazil's internal political and judicial dynamics, including the proceedings involving former President Jair Bolsonaro (Bade & Pearson 2025; United States 2025). By formalizing the measure through Executive Order 14323, Washington elevated the dispute to a national emergency frame, asserting that Brazilian policies and actions constituted an "unusual and extraordinary threat" to national security, foreign policy, and the economy (United States 2025).

Washington's approach produced two immediate effects in Brazil. First, tying tariff penalties to domestic judicial processes recast the episode as interference rather than trade bargaining, activating sovereignty reflexes across the political spectrum. Second, the emergency rationale reinforced this interpretation for Brazilian elites. Invoking emergency authority signaled political coercion rather than ordinary protectionism, widening the dispute from commerce into institutional legitimacy.

Brazilian assessments were further sharpened by parallel pressure tactics against other partners, including Canada and Mexico. In early 2025, the administration threatened and began moving toward broad tariffs on imports from both countries, explicitly tying the measures to border security, fentanyl flows, and migration under an emergency logic rather than a conventional trade remedy rationale (White House 2025b). In Mexico's case, tariff threats were used to compel visible enforcement measures, including large scale deployments of troops to the northern border, underscoring the premium placed on demonstrable compliance (Wagner 2025).

A similar coercive template was applied to Colombia. In January 2025, Washington threatened steep tariffs and visa restrictions after Bogotá initially refused United States deportation flights, and the standoff was rapidly reversed after escalation (Montoya Galvez 2025). For Brazilian decision makers, these episodes reinforced a shared inference that economic instruments were being operationalized as cross domain tools for enforcement and signaling, not merely as trade measures. That perception raised the reputational costs of yielding and strengthened the perceived need for coordinated domestic and diplomatic counter mobilization.

Brazil's official response was cautious in method but firm in principle. Brasília emphasized negotiation as the primary channel, while signaling retaliation options through the Economic Reciprocity Law framework (Máximo 2025; Brazil 2025a). The Reciprocity Law, promoted as a strategic response to unilateral restrictions, institutionalized Brazil's ability to impose reciprocal measures when its sovereign choices are constrained by external economic pressure (Brazil 2025a). The combination of principled rhetoric and legal preparation served two functions. It strengthened Brazil's bargaining position by credibly signaling that escalation would impose costs on both sides, and it reduced the government's domestic reputational costs by defending autonomy.

Structural trade facts also undermined Washington's narrative of corrective tariffs. United States government data show a persistent goods surplus with Brazil, reported at US\$ 6.8 billion in 2024, alongside substantial services trade (USTR 2024). Brazil's Ministry of Foreign Affairs emphasized that, when goods and services are combined, the United States surplus was even larger, positioning the tariff action as politically motivated rather than economically corrective (Brazil 2025b). These figures do not eliminate trade frictions, but they weaken the legitimacy of punitive measures framed as deficit correction.

By late 2025, the White House issued an order modifying the scope of tariffs on Brazil, suggesting that the coercive approach did not produce straightforward

compliance and required adjustment to limit collateral costs (White House 2025c). The episode thus ended in de-escalation without settlement. Its principal legacy is reputational and institutional. It deepened Brazilian skepticism of conditionality and strengthened the domestic coalition in favor of strategic autonomy.

COERCIVE STATECRAFT BEYOND BRAZIL AND THE PROBLEM OF PRECEDENT

The Brazil case unfolded alongside a broader pattern of increasingly coercive hemispheric statecraft. A key illustration is the January 2026 United States-led operation that resulted in the capture and detention of Venezuela's Nicolás Maduro on federal charges, an event that has triggered diplomatic, legal, and normative debate across the hemisphere (Farella 2026; Vigil 2026). Regardless of one's judgments of legality or desirability, the incident functions as a demonstration signal that Washington is prepared to blur boundaries between law enforcement and coercive intervention when it defines the target as a transnational security threat.

This matters for Brazil because it increases the perceived risk of escalation when disputes are politicized. It also amplifies the sovereignty sensitivity that shapes Brazilian elite consensus. Brazil does not need to anticipate direct coercion to revise its risk calculus. It needs only to observe that exceptional measures are being normalized in the hemisphere. In that environment, even cooperative domains can become contested if they are perceived as latent pathways to leverage.

Another illustration is the expansion of extraterritorial economic coercion. In January 2026, the White House announced a mechanism threatening tariffs on imports from countries that provide oil to Cuba, formalizing a method for applying trade penalties through third-party supply relationships (White House 2026). Such measures widen uncertainty for regional supply chains and complicate investment decisions. They also reinforce perceptions of a more hierarchical hemispheric order in which sovereignty becomes negotiable when United States domestic objectives are at stake.

For middle powers, this dynamic is not only normative but strategic. If interventionist and extraterritorial logics become routine in the United States' neighborhood, then the threshold for analogous behavior may fall elsewhere. Permissive precedent can travel, providing a ready made repertoire for other powers such as China or Russia to justify cross border coercion through protective rationales, law enforcement claims, or extraterritorial economic penalties. The consequence is an erosion of reciprocity based restraint. As norms weaken, smaller and mid-sized States operate in a less predictable environment in which

sovereignty becomes contingent and bargaining power, rather than rules, does more of the work of securing autonomy.

DIPLOMATIC THINNESS AND FUNCTIONAL RESILIENCE

In parallel with political volatility, the bilateral relationship has been shaped by diplomatic thinness, meaning fewer high level political touchpoints and a narrower capacity for symbolic reassurance during disputes. As of early 2026, the US mission in Brasília has continued under a *chargé d'affaires* arrangement (U.S. Mission in Brazil 2025). The absence of a Senate-confirmed ambassador does not preclude effective diplomacy, but it weakens signaling, reduces convening power, and can slow crisis defusion when escalation pressures rise.

In this environment, working-level resilience becomes central. Functional agencies, trade officials, and private sector interlocutors sustain cooperation through technical routines and ongoing problem solving even when political rhetoric intensifies. This helps explain how the relationship avoided rupture in 2025. Negotiation channels stayed open, while bureaucratic and commercial actors emphasized the shared costs of escalation and the narrow but real benefits of selective cooperation (Sá Pessoa 2025). The result is a relationship that remains operationally functional even as it grows politically brittle.

SECURITY COOPERATION AS A STABILIZER AND CONTESTED SYMBOL

Security cooperation remains the most plausible near term stabilizer because it can be defended as mutual risk reduction rather than ideological alignment, even as it is politically legible as a symbol of alignment. The United States national security framing elevates cooperation against cartels and transnational criminal organizations as a hemispheric priority (White House 2025a). Brazil has its own incentives to deepen cooperation on transnational organized crime, including port security, customs enforcement, and financial intelligence (Muggah 2025a; Muggah 2025b; Muggah 2025c).

However, the same conditions that make security coordination necessary also make it politically sensitive. Under coercive signaling, even routine collaboration can be read as conditionality or deference. Brazil's strategic autonomy doctrine therefore favors thin cooperation that is operational and bounded, rather than thick cooperation that implies political alignment. Thin cooperation can include intelligence sharing on illicit finance, joint technical initiatives to harden ports, and coordinated enforcement against trafficking networks. Thick cooperation, by

contrast, would entail shared political framing, durable institutional integration, or explicit geopolitical alignment, all of which are less likely.

Brazil's emphasis on autonomy therefore does not signal refusal. It signals a preference for modular cooperation that can be insulated from broader political disputes. For Washington, this may feel less satisfying than alliance-style integration. For Brasília, it is the only cooperation geometry compatible with domestic sovereignty norms.

CRITICAL MINERALS AS THE MOST CREDIBLE POSITIVE AGENDA

If any domain can generate a positive, politically resilient agenda, it is critical minerals, particularly rare-earths. The United States has strong incentives to diversify supply chains away from Chinese dominance in refining and processing, a vulnerability that has become more salient amid global industrial policy competition (Northey & Bikales 2026; Martina et al 2026). Brazil holds relevant reserves and could position itself as both a supplier and a potential processing node, provided it secures investment and technology transfer (Pope & Smith 2023; Muggah 2026).

A concrete signal of this opportunity is the US Development Finance Corporation's (DFC) approval of financing for Serra Verde's rare-earth project in Goiás, explicitly framed as part of diversification efforts (Lovisi 2026; Magnotta 2025). The DFC's project documentation describes the mine and associated facilities and clarifies the investment rationale as supporting supply chain resilience (DFC 2025). For Washington, this is a strategic bet on non-Chinese supply. For Brazil, it is a pathway to attract capital and potentially upgrade industrial capabilities.

If any domain can generate a positive, politically resilient agenda, it is critical minerals, particularly rare-earths.

Yet the political economy is complex. Brazil will seek value capture through domestic processing and downstream integration rather than serving only as a raw-materials supplier. A minerals partnership that reproduces an extractive pattern without upgrading is unlikely to be politically stable. Moreover, Brazil will avoid explicit anti-China alignment even when diversification serves US strategic aims. Minerals cooperation will therefore be framed as investment, industrial policy, and resilience rather than bloc politics.

If managed carefully, critical minerals can provide what the broader relationship often lacks, namely a shared project with identifiable constituencies,

measurable deliverables, and economic upside. By creating durable commercial and subnational stakeholders, such projects can generate political ballast that persists even when bilateral rhetoric deteriorates. It also offers a reputational counterweight to tariff coercion by shifting the bilateral narrative from punishment toward joint capacity building.

DIGITAL GOVERNANCE AS A RECURRENT FRICTION POINT

Digital governance is emerging as a second structural source of friction because it sits at the intersection of market regulation, political legitimacy, and national security narratives. Brazil has advanced proposals to regulate digital markets and large platforms, with legislation framed by some actors as analogous to EU style *ex ante* regulation (US Chamber of Commerce 2025). Domestic debate over platform rules is tightly bound to concerns about misinformation, democratic resilience, and information integrity (Muggah & Margolis 2023). In the United States, by contrast, platform regulation is entangled with disputes over free expression, market access, and geopolitical competition.

These divergent frames create fertile conditions for securitization. United States industry and policy actors may interpret Brazilian rules as discriminatory or as heightened political risk for United States firms, while Brazilian actors interpret United States pressure as an attempt to constrain sovereign regulatory authority. Once these conflicts spill into trade policy, they become harder to resolve because the dispute shifts from technical compliance to questions of values, institutional legitimacy, and control over the information space.

Brazil's Supreme Court has also moved toward frameworks that increase platform liability for illegal content, reinforcing the trajectory toward tighter governance of digital ecosystems (Savarese & Hughes 2025). Although grounded in domestic legal processes, such decisions can be read externally as *de facto* changes in market access and liability exposure with cross border implications. Under conditions of heightened bilateral suspicion, digital policy can therefore function as a proxy arena for wider geopolitical contestation, amplifying volatility even in periods of cooperation elsewhere.

CHINA AS A STRUCTURAL CONSTRAINT AND BARGAINING BOUNDARY

China functions as the central structural constraint in United States-Brazil relations and sets a clear bargaining boundary for Brasília. As Brazil's largest trading partner, Beijing is pivotal to export revenues and increasingly embedded

in infrastructure and industrial supply chains. Brazilian diplomacy has continued to engage China at high levels, reflecting how hard this relationship is to replace for growth and balance of payments stability (Sá Pessoa 2025b). This reality limits Washington's ability to impose either or alignment demands and constrains Brasília's willingness to adopt rhetoric that could jeopardize economic stability. It also reinforces incremental de-dollarization efforts, visible in reserve diversification and payments infrastructure (Banco Central do Brasil 2025).

At the same time, Brazil has faced pressures from shifting global trade flows, including the influx of cheaper Chinese goods redirected by trade tensions. This has intensified protectionist impulses and industrial policy debates in Latin America, including Brazil (Ho-Him, Debre, Batschke & Sánchez 2026). Brazil's relationship with China is structural, but not unproblematic, and hedging now includes financial as well as trade instruments (Máximo 2025).

Brazil will continue to hedge, seeking diversification where feasible, while maintaining the trade fundamentals that anchor its macroeconomic position.

For United States policy, the implication is straightforward. Coercion aimed at forcing alignment is likely to be counterproductive, accelerating Brazilian hedging and hardening autonomy preferences across economic, regulatory, and monetary domains. Positive agendas that enable diversification without demanding binary commitments, including critical minerals investment and targeted supply chain partnerships, are more likely to succeed because they build constituencies for cooperation while leaving Brasília room to manage its China exposure and its preference for greater monetary autonomy.

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PROSPECTIVE TRAJECTORIES IN 2026

The most plausible 2026 outcome is neither alignment nor estrangement but managed volatility, an operating condition defined by three recurring features. First,

cooperation is compartmentalized. Deliverable oriented domains such as critical minerals and selective security cooperation can expand, while high salience arenas such as tariffs and domestic judicial and institutional disputes remain contested. The late 2025 adjustment of tariff scope points to a pragmatic recognition of escalation costs and the limits of sustained pressure (White House 2025b).

Second, interference sensitivity remains decisive. Any United States signaling that appears to condition trade policy on Brazil's judicial processes will predictably trigger nationalist pushback and narrow the space for compromise. The 2025 tariff crisis shows how quickly domestic legitimacy concerns can become the dominant frame, displacing narrower bargaining over commercial terms (United States 2025; Sá Pessoa 2025a).

Third, China functions as a constraint rather than a discrete agenda item. United States pressure is filtered through Brazil's structural reliance on Chinese demand, while Brasilia's diversification efforts are filtered through Washington's concerns about Beijing dominance across critical supply chains (Sá Pessoa 2025b). The effect is to bound the feasible bargaining space for both capitals even when their short-term interests overlap.

In such an environment, crisis management mechanisms matter as much as grand strategy. Direct leader-to-leader communication can prevent escalation, but the deeper stabilizer is institutional. Dispute resolution channels, modular cooperation, and disciplined signaling that avoids converting each episode into a sovereignty test will determine whether volatility remains manageable.

CONCLUSION

The return of a “big stick” posture in the Americas is best understood as a shift in the logic and instruments of hemispheric policy. The Western Hemisphere is increasingly framed as an extension of United States homeland governance, and economic levers are deployed as general instruments of coercive diplomacy. Brazil is the key test case because it combines strategic importance with a strong autonomy doctrine and high sensitivity to perceived interference. The 2025 tariff crisis demonstrates that coercion tied to domestic political and judicial dynamics is likely to backfire, reinforcing resistance and narrowing pathways to durable cooperation.

At the same time, selective cooperation is feasible and likely. Security coordination can persist in thin forms that deliver operational value without implying alignment. Critical minerals offer the most credible positive agenda because they align Brazil's resource base with United States supply chain diversification imperatives, as illustrated

by the DFC-supported Serra Verde project. Yet the relationship remains structurally constrained by China's economic centrality and by politicized disputes over digital governance.

The most realistic expectation for 2026 is managed volatility. Both capitals have incentives to avoid rupture and to secure limited wins for domestic audiences, especially in election years. Absent a shift away from coercive signaling toward mutually beneficial bargaining, volatility will remain a structural condition of United States-Brazil relations in the new hemispheric environment. Washington is expanding a coercive repertoire, while Brazil is seeking to preserve autonomy without triggering rupture. ■

The return of a “big stick” posture in the Americas is best understood as a shift in the logic and instruments of hemispheric policy. The Western Hemisphere is increasingly framed as an extension of United States homeland governance, and economic levers are deployed as general instruments of coercive diplomacy.

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External Peril, Internal Fatigue: Toward a Reconstruction of Brazilian Statecraft
Philip Yang

External Peril, Internal Fatigue: Toward a Reconstruction of Brazilian Statecraft

Philip Yang

Abstract: Amid the external peril of US military coercion and the backdrop of China's industrial ascent, compounded by internal institutional fatigue, this article argues for a reconstruction of Brazilian statecraft grounded in material capabilities and strategic coordination. The “Two Parallel Tables” method converts great power rivalries into technological, industrial, and financial gains, with India as a strategic third space. The article outlines a path for Brazil to transform domestic exhaustion into a durable core of autonomous power by anchoring deterrence in non-military arrangements.

Keywords: Brazilian foreign policy; Brazilian statecraft; U.S. military supremacy; U.S. economic decline; rise of China.

Perigo externo, fadiga interna: rumo a uma reconstrução da arte de governar brasileira

Resumo: Este artigo defende uma reconstrução da diplomacia brasileira, fundamentada em capacidades materiais e coordenação estratégica, em meio ao perigo externo da coerção militar dos EUA e ao pano de fundo da ascensão industrial da China, agravados pela fadiga institucional interna. O método das “Duas Mesas Paralelas” converte rivalidades entre potências em ganhos tecnológicos, industriais e financeiros, com a Índia como terceiro espaço estratégico. O artigo delineia um caminho para que o Brasil transforme o esgotamento interno em um núcleo duradouro de poder autônomo, ancorando a dissuasão em arranjos não militares.

Palavras-chave: política externa brasileira; governança brasileira; supremacia militar dos Estados Unidos; declínio econômico dos Estados Unidos; ascensão da China.

The arrest of Nicolás Maduro in Venezuela—executed with a precision and speed that only the United States can currently command—exposed the raw military supremacy of the American hegemon. This rare synthesis of intelligence and logistics unfolds against the backdrop of a world undergoing its most significant shift in economic power in three centuries, with China consolidating its position as the planet’s preeminent geoeconomic and industrial hub. The twenty-first century thus reveals a decisive dichotomy: a power that dominates coercion versus one that commands the world’s workshop.

This contrast must not be reduced to caricature. American strength still rests upon an innovative economy and a singular capacity to organize global financial and technological standards. Conversely, Chinese power is characterized by rapid military modernization and a burgeoning ability to project influence through infrastructure, credit, and production networks. However, the larger landscape of trends reflects a long-term robust ascent of China and other Global South powers and a relative decline of the US. Taken together, these trends point to the end of the current world order—its institutions still barely standing, and its hierarchy increasingly contested by rival centers of production, standards, and legitimacy. And this wider temporal arc forces a critical reflection on the role of middle powers in a world where a military hegemon confronts an industrial one.

It is within this context that Brazil must contemplate its international standing. It is not a matter of trading one alignment for another or reenacting the

We must recognize that today’s decisive vectors of power—value chains, technical standards, critical minerals, artificial intelligence, and digital infrastructures—reorganize risks and opportunities more swiftly than traditional narratives can follow. As the military hegemon increasingly relies on coercion to achieve its goals, Brazil’s primary challenge is to develop non-military capabilities against economic or warlike threats.

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rigid ideological binaries of the twentieth century. Instead, we must recognize that today's decisive vectors of power—value chains, technical standards, critical minerals, artificial intelligence, and digital infrastructures—reorganize risks and opportunities more swiftly than traditional narratives can follow.

As the military hegemon increasingly relies on coercion to achieve its goals, Brazil's primary challenge is to develop non-military capabilities against economic or warlike threats. Simultaneously, as economic power shifts away from the West, Brazil must adopt a transactional method to convert national assets into verifiable gains in productive capacity and autonomy. What has changed is not the nature of power itself, but the manner in which it is accumulated and projected across arenas linked by highly complex transmission belts.

BEYOND CONVENTIONAL IDEOLOGIES: FOREIGN POLICY AS A TOOL FOR STATECRAFT

International disputes are still too often narrated through twentieth-century binaries—democracy versus authoritarianism, capitalism versus socialism. But foreign policy today is less about rhetorical alignment than about who controls the practical levers of power: standards, value chains, energy, data, finance, and the security architectures that protect them. In that environment, moral labels can obscure what matters most for Brazil: which external relationships expand domestic capability and which merely impose dependencies.

Major centers of power now compete across distinct dimensions of performance—security, social cohesion, innovation, industrial depth, and State managerial capacity—and these outcomes do not map neatly onto a liberal-illiberal axis. If foreign relations are meant to help inspire or catalyze Brazil's domestic transformation, we must stop treating diplomacy as an extension of ideological identity and start treating it as an important tool of statecraft: the disciplined selection of partnerships that generate verifiable gains in productivity, technology, and institutional resilience.

This is not a utilitarian plea. If we affirm ourselves as defenders of democracy, we should ask—also in external strategy—which institutional arrangements actually enable meaningful societal participation in strategic decisions, strengthen accountability, and produce competent leadership. Similarly, if we care about justice, we should examine which systems have proven capable of producing and distributing prosperity, building public goods at scale, sustaining a stable middle-class society, and preventing the State from being captured by private interests. These should not be blueprints for imitation, but benchmarks for Brazil's own

institutional evolution—and they should inform the practical terms of our external relations, not just our speeches.

Likewise, liberty in the twenty-first century also requires a foreign-policy dimension. Freedom is no longer measured only by the absence of censorship, but by who governs society's digital architecture. Platforms calibrate incentives, monetize attention, and shape visibility; when the informational infrastructure of a nation is effectively outsourced, social cohesion—and thus sovereignty—can be corroded from within. For Brazil, this is not a philosophical worry; it is an external-strategy question about regulatory coalitions, standards, data governance, cybersecurity, and technological dependence.

Erosion of control over a society's digital framework underscores that liberty cannot survive if its material and technological foundations are under foreign or private control.

Seen through this lens, China's rise complicates the West's familiar moral map. On several outcomes that are routinely invoked as universal aspirations—large-scale provision of public goods, poverty reduction, and long-horizon coordination, state managerial capacity—China often outperforms countries that speak the language of liberal virtue. The post-war idealism of the Universal Declaration (1948) soon fractured into competing priorities: civil and political rights in the West, economic and social rights in the socialist bloc. Both projects eventually revealed structural weaknesses—Soviet coercive inefficiency on one side, and, on the other, a growing strain of inequality and social fragmentation within the American model.

China appears less as a negation of the East and West systems than as a synthesis of their virtues and vices: markets without surrendering State direction, industrial dynamism alongside political discipline, and private gains combined with the mass production of public goods. Brazil should therefore judge systems less by their labels than by what they reliably deliver—and translate that judgement into foreign policy: partnerships that build autonomy, cohesion, and productive capacity within a framework of participatory politics.

Likewise, liberty in the twenty-first century also requires a foreign-policy dimension. Freedom is no longer measured only by the absence of censorship, but by who governs society's digital architecture.

TERRITORY AND TRACKS: SOVEREIGNTY ON THE NEW FRONTIERS

If ideology no longer serves as an adequate compass, the question of power becomes operational: where, in fact, does power sit? It sits over territory, yes, but also over the infrastructures and flows—data, capital, goods, energy, and standards—that make territory governable. Today, influence is a mosaic in which technology firms often control critical chokepoints. What matters is the mechanism by which public authority and private capacity converge to promote or erode societal interests.

Digital Sovereignty: The New Perimeter and Deterrence by Friction

In the digital realm, platforms and infrastructures function as para-sovereign entities, shaping the public sphere and determining data security. They calibrate incentives, monetize attention, alter the emotional climate of societies, and, ultimately, redefine the social contract. Therefore, a State that does not control its informational architecture becomes subordinated to external platforms, to the detriment of its social cohesion.

Across centers of power, the nature of this public-private connection differs sharply. China offers a textbook demonstration of State primacy, redrawing market boundaries when it judges that social cohesion or data sovereignty is at stake, as seen in the halt of Ant Group's IPO, the actions against Alibaba, the retrenchment of Didi, and the ban on Western social media tools. The American choreography involves influence flowing through lobbying, standards-setting, and access. The courtship of political power by platform barons like Bezos, Zuckerberg, and Musk serves both as an alliance and a preemptive adaptation. Palantir—a flagship contractor specializing in large-scale data integration for defense—illustrates how “incorporation-by-procurement” turns private architecture into State capability while entrenching private power inside the State and blurring the boundary between public purpose and private interest.

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Both paths entrench elites within the State, though through opposite logics: command in China, capture in America.

A further frontier is artificial intelligence. In practice, AI is becoming a strategic layer of statecraft: whoever controls computers, chips, cloud infrastructure, and model standards can shape productivity—and constrain others. For Brazil, this calls for an explicit AI diplomacy anchored in industrial policy and procurement power: partnerships for data centers and talent, rules on data governance, and a clear position on export controls and platform dependencies—so that “digital sovereignty” is not rhetorical but operational.

Physical Sovereignty

Geography is reconfigured, not eliminated. Physical bottlenecks—ports, refineries, submarine cables, and logistical corridors—return as decisive chokepoints managed through a juxtaposition of State and private controls. For a continental power like Brazil, inaction is vulnerability. Sovereignty is not merely “having the resource,” but turning it into industrial learning. The Venezuelan episode proves that military force may secure access, but it cannot substitute for the long-run governance required to keep wells producing. In this context, Petrobras’ prolonged absence in Venezuela is difficult to justify; Brazil should position itself before the regional ecosystem hardens around others. Sovereignty now means command of both matter and signal.

The same logic applies to the energy transition. Decarbonization is rapidly turning into geoeconomic competition—through carbon border measures, subsidies, and green standards that increasingly operate as gatekeepers to markets, procurement, and finance, and can function as new tariffs by other means. Brazil’s leverage is unusually strong—clean electricity, biofuels, critical minerals—but only if it can translate resources and market size into industrial learning and negotiated access to technology, rather than mere commodity exports.

This is where urban policy and subnational action become instruments of statecraft: cities and states are where emissions are regulated in practice—through building codes, transport systems, land-use rules, and public procurement—and thus where green standards can be implemented at scale, credibly measured, and, if well coordinated by the federal government, turned into market power and diplomatic leverage.

The capture of Maduro underscores that sovereignty without deterrence is fragile. For Brazil, deterrence is not about an arms race or swollen defense budgets. It is about raising the political, operational, and reputational cost of unilateral coercion,

so that incursions become harder to justify and more expensive to repeat. This is built through layered measures: strategic partnerships that signal that coercion will not be costless, protection of critical infrastructure, enhanced cyber resilience, and fostering maritime domain awareness.

Hence, the deeper implication is collective. For a middle power, resisting coercion by a superpower is not, in practice, a military problem; it is logistical, financial, reputational, and legal. No middle power can, alone, impose limits on a coercive superpower operating at a continental scale—least of all in a hemisphere historically treated as a privileged security theater. What can be imposed, however, is a *structure of costs and constraints*. When unilateral action meets coordinated friction—legal contestation, selective denial of cooperation, trade and payment insulation, diplomatic costs, maritime coordination, and tighter control over critical enablers—the act may still occur, but it becomes harder to normalize and costlier to repeat.

This is where “deterrence” ceases to be a euphemism for rearmament and becomes a doctrine of collective restraint: the benchmark is not symmetry of force, but symmetry of resolve among States that share an interest in limiting exceptionalism. That interest is not ideological; it is structural. A world that tolerates unilateral coercion in one region will invite it elsewhere—because precedents travel faster than fleets.

A colder interpretation is possible: that great powers drift toward tacit spheres—Washington in the Western Hemisphere, Moscow in its near abroad, Beijing in Asia—each practicing selective indignation and selective restraint. Yet this “arrangement” is brittle, because the modern economy does not respect cartographic lines: supply chains for critical materials, energy routes, payment rails, data infrastructure, and standards spill across regions, so disruption in one theater propagates into others.

This reality forces two pressing questions upon the system: first, whether middle powers—a Brazil or a Canada—possess the agency to navigate or avoid such rigid compartmentalization; and second, to what extent rival powers like China and Russia truly accept the premise of an American Hemisphere, or merely bide their time while cultivating tools of long-term contestation.

This friction between geographic spheres and global networks suggests that the future of order will be defined less by clean divisions than by persistent, volatile entanglement. The key uncertainty may lie in whether middle powers become the primary theaters of this contest, or its most inventive navigators. This is precisely where middle powers can matter. Their comparative advantage is not dominance but convening: translating diffuse interests into operational pacts, and converting principles into cumulative, issue-based coalitions.

Charters of an eroded world order do not enforce themselves. Coalitions do. The task for countries like Brazil is therefore to help organize a practical coalition of restraint—modular, credible, and sustained—so that sovereignty becomes more than a legal abstraction and “non-interference” becomes more than a slogan.

A BRAZILIAN METHOD: COORDINATION, TWO TABLES, AND A REGIONAL PERIMETER

The Venezuelan precedent restores the regional perimeter to the center of Brazilian strategy. Defending regional sovereignty is not the same as defending governments; it requires protecting critical infrastructure and updating defense scenarios against extra-regional hybrid risks—such as sanctions, cyber operations, and the strategic control of routes. In this environment, deterrence means raising the political and operational costs of exceptional actions, making it harder to justify and more expensive to repeat.

This arc must be built in layers: in South America, a region increasingly polarized, the foundation is not unity but resilience that survives division—minilateral crisis coordination, continuity protocols for critical infrastructure and payments, and shared maritime awareness that reduces deniability and raises the logistical, legal, and reputational costs of unilateral force. Across the South Atlantic, ZOPACAS and operational cooperation with South Africa, Angola, and Nigeria should serve the same purpose: early warning, route resilience, and collective attribution—tools of friction, not substitutes for hard power. Beyond the hemisphere, flexible coalitions with India and other Global South poles diversify technology, standards, and financial options; and in North America, contingencies with Mexico and Canada should focus on trade defense and shock insulation if tariff warfare returns as a hemispheric instrument.

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In that framework, rejecting the Monroe Doctrine is not rhetoric but action: the hemisphere cannot function as a standing zone of exception. Brazil should be explicit with China and Russia that an unchecked American omnipresence

narrows their room for maneuver and turns South America into a testbed for unilateral pressure—creating shared incentives to defend rules and non-interference. The practical agenda is deterrence by variable geometries: steady rule-anchored diplomacy paired with payment and settlement arrangements that reduce exposure to extraterritorial leverage.

A fundamental prerequisite is a domestic pact to stop bargaining in silos. Brazil often negotiates its assets as if each sector were the country, offering piecemeal solutions when a strategy is required. A permanent structure of strategic coordination is necessary to unify objectives and price concessions. When Brazil coordinates, it can exchange market access and predictability for productive presence, R&D, and verifiable targets.

This coordination powers the “Two Parallel Tables” method, exploiting systemic rivalry where both Washington and Beijing need Brazil asymmetrically. Negotiate parallel, contractual tracks—leveraging one to sharpen the other—without satellite status:

- With Washington, demand verifiable concessions: commercial stability (tariff exemptions, standing consultations); research and co-production in critical technologies (defense/aerospace, cyber, power electronics, AI, biotech); and financial track safeguards (sanctions resilience, stablecoin/payment neutrality)—in exchange for strategic minerals, food/energy security, and regional stabilization capacity.
- With Beijing, trade market/resource access for productive presence: factories, engineering centers, local supplier linkages, transition-sector R&D—ensuring value chain participation yields industrial learning, not dependency.

Additionally, financial and digital tracks need also to be taken as part of deterrence efforts. Payment standards, settlement rails, and tokenized dollars can become instruments of influence—or shields if designed as resilient public infrastructure.

This dynamic opens the door for a practical response: Brazil should treat Pix and Drex as critical infrastructure and use them to design regional settlement mechanisms. The objective is to diversify payment infrastructure and the composition of reserves without ideological gestures, reducing dependence on a single pipeline. In technological and financial agreements, Brazil must demand clauses of operational continuity, neutrality, and transparency.

Pix’s transformation into a credit mechanism—via buy-now-pay-later installments on pre-authorized bank lines settled instantly through Pix—could further bolster this infrastructure, challenging credit cards already weakened by Pix’s everyday dominance.

This would universalize consumer credit without card networks, merchant fees, or foreign intermediaries, integrating fluid scoring for inclusion.

This strategy is catalyzed by the potential integration of digital currencies among BRICS partners, specifically through the UNIT initiative. Envisioned as a unit of account backed 40% by gold reserves and 60% by a basket of BRICS currencies, UNIT represents a technical response to the weaponization of the dollar. While still in its formative stages, the initiative offers a blueprint for a decentralized financial architecture that aligns with Brazil's pursuit of transactional autonomy. Operationally, this means accelerating Drex with robust governance, signing local-currency swap agreements with trade partners—especially in energy flows—and regulating domestic stablecoin providers with strict requirements for backing and responsibility.

This payment sovereignty could extend strategically: Brazil should initiate technical consultations with major US debt holders—beginning with BRICS partners—on reserve diversification through interoperable platforms like Drex-Pix. Not to orchestrate confrontation, but to architect resilience: regional settlement mechanisms that quietly reduce single-asset dependence while commanding neutrality commitments from all poles. In the end, Brazil's coordination strategy could contribute to an evolutionary, non-revolutionary erosion of USD dominance over decades, which would avoid disruption of the workings of the world economy, cumulatively amplifying gradual diversification trends already underway.

THE THIRD SPACE: INDIA AS A MULTIPLIER OF AUTONOMY

Diplomacy confined to the US-China axis tends to reproduce binary dependence. A serious strategy requires a third space—an additional vector of leverage to diversify standards, supply chains, and political options. India is the most consequential candidate for this role, not out of sentimental fashion, but through a historical method that recognizes Asia reclaiming its weight in the global economy. To view the twenty-first century solely as a duel between Washington and Beijing is analytically incomplete and strategically costly for Brazil.

India is already a continental-scale economy with strategic longevity and a growing capacity to organize large programs across sectors vital to sovereignty—digital infrastructure, health supply chains, and industrial upgrading. While its trajectory differs from China's, it matters as an additional pole in the architecture of payments and industrial partnerships. India's most underappreciated lever is software as State capacity. Over the past decade, it has built national-scale digital public infrastructure (DPI)—interoperable rails for identity and payments, such as

the UPI—demonstrating how a State can treat code and standards as instruments of sovereignty rather than imported conveniences.

For Brazil—which pioneered Pix and is designing Drex—India serves as a laboratory of scale for governing the digital “tracks” on which social and economic life increasingly runs. The practical lesson is stark: we failed to anticipate China’s rise as a system-building power, paying the price of a thinning industrial base, and we cannot repeat this error by discovering, a decade hence, that new standards and procurement ecosystems have crystallized without us.

India must therefore be approached as a strategic multiplier of autonomy through a concrete agenda: digital infrastructure cooperation on interoperability, governance design, and cybersecurity standards to transform rails into national capability; health and pharmaceuticals framed as resilience rather than mere commerce, leveraging joint ventures to mitigate supply shocks; and industrial upgrading via India’s engineering ecosystems for diversified talent and innovation access, with Brazil reciprocating through energy, food security, and minerals.

A stronger India strengthens a world where power is less likely to collapse into a single hierarchy. It expands the possibility of coalitions not subordinated to either Washington or Beijing, increasing the number of credible partners for negotiating on standards and security of supply. India must be factored into Brazilian statecraft early—as a structural bet on the long arc of convergence. Africa belongs to the same third-space logic as an arena for shaping the strategic geometry of the South Atlantic and the expansion of economic cooperation.

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CONCLUSION

Power in our time no longer presents itself in a single currency. It manifests in distinct forms—coercive and geoeconomic—and travels through tracks of exceptional complexity: finance and payments, technical standards, logistics, and industrial learning. The intervention in Venezuela restores raw coercion to the Hemisphere, while China’s ascent continues to reorganize the world’s productive

base. These developments do not oblige Brazil to “choose a side,” but they do compel it to adopt a method.

That method requires domestic coordination to overcome bargaining in silos, parallel negotiation with the United States and China under verifiable targets, and the protection of a regional perimeter anchored in rules. It also requires widening Brazil’s strategic field beyond the Washington–Beijing axis. India must be factored in as a multiplier of autonomy—an emerging system-builder in digital governance, software capability, and standards. The misreading of China—treated too long as a market rather than a power that designs systems—must not be repeated with India. Arriving late in a century defined by platforms, algorithms, and standards is a structural handicap.

Yet method cannot survive on intention alone. It requires institutions capable of continuity—institutions of statecraft that accumulate strategy across administrations and translate national assets into national leverage. Brazil needs a clearer toolkit of economic statecraft: investment screening in strategic sectors, safeguards on critical infrastructure ownership, coordinated export promotion and credit, and a disciplined approach to standards diplomacy.

Without such instruments, the country’s bargaining posture will remain reactive—strong in assets, weak in leverage. That means a standing interministerial strategic council; a permanent planning staff with cross-party legitimacy; and a national economic-security board tying finance, industry, and technology to diplomacy. Without such institutions, Brazil will keep rewriting strategy every cycle and negotiating as fragmented sectors—mistaking diplomacy for episodic negotiation and sovereignty for rhetoric.

Brazil’s history is, in part, a long oscillation between decentralization and re-centralization: between the dispersion of authority into factions, regions, and cycles,

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and the reconstitution of a center capable of coordinating the State. In calmer times, dispersion may be tolerable—even healthy. In an era of systemic rivalry and normalized exception, it becomes a liability. The question is not whether democracy should yield to “permanent reason of State,” but how a democracy can equip itself with a durable strategic core: a way to reconcile electoral change with survival-interest reasoning, so that foreign policy is not rewritten as improvisation every four years.

The Venezuelan episode also illuminates a moral question for middle powers. The American operation suggests the risk of a vacuum of values at the heart of hegemony, where power suffices as performance and reason becomes optional. It is against this normalization of exception that the Brazilian foreign policy must be constructed. Transactional autonomy is not cynicism; it is strategic prudence oriented by ends. Brazil ceases to be an object only when it learns to dictate terms—defending an idea of order where force does not replace legitimacy, and interest does not abolish responsibility.

Let external peril and internal institutional fatigue converge into Brazil’s strategic opportunity: that shocks beyond our borders and the drift at home—moral and institutional—finally compel the long-delayed reconstruction of Brazilian statecraft. 

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US, Brazil and Argentina flags over puzzle pieces. Image: Shutterstock.

La Argentina de Milei y el Brasil de Lula frente al primer año de Trump II

Esteban Actis

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Resumen: El regreso de Trump a la Casa Blanca se transformó en la principal variable sistémica sobre las dinámicas domésticas y externas de la Argentina bajo el gobierno de Javier Milei y del gobierno de Lula da Silva en Brasil. En un contexto de mayor injerencia e influencia sobre América Latina, mientras Argentina ensayó un acoplamiento a los intereses de Washington y recibió una gran “zanahoria”, Brasil tuvo que enfrentar “garrotes” y profundizar la estrategia de *hedging*. El análisis de dichas estrategias y sus primeros resultados son el principal objetivo del presente ensayo.

Palabras clave: Trump; Argentina; Brasil; acoplamiento; *hedging*.

Milei’s Argentina and Lula’s Brazil in the Face of Trump II’s First Year

Abstract: Donald Trump’s return to the White House became the main systemic variable shaping domestic and external dynamics in Argentina under the government of Javier Milei and in Brazil under the government of Luiz Inácio Lula da Silva. In a context of increased US involvement and influence in Latin America, while Argentina pursued alignment with Washington’s interests and received a substantial “carrot,” Brazil faced “sticks” and deepened its hedging strategy. An analysis of these strategies and their initial outcomes is the main objective of this essay.

Keywords: Trump; Argentina; Brazil; alignment; hedging.

Las elecciones presidenciales en Estados Unidos siempre han sido una variable sistémica importante para América Latina dado la centralidad de Washington para la inserción internacional de los países de la región. Esta dinámica se ha acentuado en la última década a medida que la política exterior de EE. UU. se estructura más sobre una política de gobiernos que de Estado, debido a la ruptura de consensos bipartidistas sobre el rol de EE. UU. en el mundo (Kanjilal 2025). Washington se ha vuelto más volátil e impredecible en su accionar externo (Yarhi-Milo 2025).

Para los gobiernos de Javier Milei en Argentina y Lula da Silva en Brasil los resultados de las elecciones de noviembre de 2024 en los Estados Unidos marcaron un punto de inflexión en cuanto a la permisibilidad externa (Jaguaribe 1979). El amplio triunfo de Donald Trump sobre Kamala Harris, por un lado empoderó y oxigenó el proyecto político del gobierno libertario en Argentina, y por el otro, se convirtió en una fuerza restrictiva y adversa para los intereses domésticos y externos del gobierno del exlíder metalúrgico en Brasil.

Esta percepción sobre los disímiles efectos sobre Buenos Aires y Brasilia que se tenía antes de que Trump comience su gobierno (Actis 2024a) se confirmó ampliamente —habiendo transcurrido el primer año de mandato de la administración Trump II— con el devenir de las acciones de la Casa Blanca. La puesta en marcha del Corolario Trump a la Doctrina Monroe (Winter 2026) no solo implicó una mayor presión e influencia sobre el denominado hemisferio occidental (Romero et. al 2025) sino una abierta injerencia en los asuntos internos de los Estados latinoamericanos (Carothers & Stunckel 2025).

En ese marco, el presente ensayo tiene como objetivo analizar la dinámica del vínculo bilateral entre EE. UU. con Argentina y Brasil —enero de 2025/enero de 2026— y realizar una evaluación parcial y comparada sobre las estrategias desplegadas por Buenos Aires y Brasilia, así como sus resultados.

Para los gobiernos de Javier Milei en Argentina y Lula da Silva en Brasil los resultados de las elecciones de noviembre de 2024 en los Estados Unidos marcaron un punto de inflexión en cuanto a la permisibilidad externa.

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ARGENTINA Y EL ACOPLAMIENTO: ZANAHORIA Y VULNERABILIDAD LATENTE

El gobierno de Javier Milei ensayó desde diciembre de 2023 una clara estrategia de acoplamiento (Russell & Tokatlian 2013), en relación con la subordinación de la política exterior al vínculo con los EE. UU. como así también una clara retracción a la política regional. La estrategia de acoplamiento ensayada por diversos gobiernos latinoamericanos en los años noventa era *status quísta* del orden internacional, de la denominada *pax americana*. Sin embargo, como el recrudecimiento del cuestionamiento al “orden basado en reglas” proviene desde la propia Casa Blanca, la administración Milei acompaña y tributa, desde la periferia, la erosión del multilateralismo y de una sociedad internacional institucionalizada. Hay una crítica desde la ideología de *alt right* (Merke & Pereira Doval 2024) al funcionamiento del orden/institucionalismo internacional liberal, cuyo antecedente latinoamericano más próximo fue la experiencia de Brasil bajo el gobierno de Bolsonaro (Casarões & Barros Leal 2022). En ese marco, el gobierno de Milei ha secundado y sobreactuado distintas acciones de su política exterior para congraciarse con Washington. Por ejemplo, en la Cumbre CELAC-China celebrada en mayo de 2025 en Beijing¹, Argentina envió un representante de tercera línea y fue el único país que decidió no firmar la declaración final².

El alineamiento de Argentina con Trump II queda claro con los viajes internacionales de Milei y con las votaciones en la Asamblea General de Naciones Unidas. En 2025 Milei viajó 7 veces a EE. UU. (30% de sus salidas del país) y, por ejemplo, no ha realizado visita alguna a Asia desde que es Presidente. El informe *Voting Practices in the United Nations 2024*

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1. El gobierno de Milei enfrió el vínculo político con China pero no así el económico/comercial. A diferencia de otras economías emergentes que intentaron frenar la sobreoferta de bienes chinos en el marco de la renovada guerra comercial de Trump, Argentina fue uno de los países que más aumentó las importaciones desde China, al liberalizar fuertemente el comercio exterior.

2. Otros ejemplos son la disociación del “Pacto del Futuro” de la ONU en septiembre de 2024, el retiro de la delegación de la COP29 en Bakú, Azerbaiyán, en noviembre de 2024; y la decisión de retirar a la República Argentina de la Organización Mundial de la Salud (OMS) en febrero de 2025; así como la ausencia de Milei de la Cumbre del G20 en Sudáfrica, en noviembre de 2025.

del Departamento de Estado (2025) señala que en la Asamblea General de ONU Argentina votó igual que EE. UU. en 82% de las ocasiones. Hay que remontarse a 1962 (contexto de la Revolución cubana) para encontrar un nivel tan alto de *vote equal* de Argentina con EE. UU. Si bien no existen datos oficiales de 2025, es de esperarse que con Trump en la Casa Blanca ese porcentaje supere el 90%.

A diferencia de otros ensayos de alineamiento que tuvo Argentina con EE. UU., como fue el caso de los gobiernos de Carlos Menem (1991-1999), el gobierno de Milei recibió una de las pocas “zanahorias” que Trump II otorgó a la región en el marco de múltiples “garrotes” (Eurasia Group 2026): una heterodoxa recompensa como fue la decisión del Secretario del Tesoro de Scott Bessent de aplicar un *Whatever It Takes* para evitar una corrida cambiaria de la Argentina en el contexto previo a las elecciones de medio término que tuvo el país en octubre de 2025. Además de otorgar un *swap* de monedas, el Tesoro intervino directamente el mercado de cambio comprando pesos³ para lograr estabilizar la moneda del país ante las presiones de devaluación y los elevados riesgos domésticos (Setser & Paduano 2025). En la bilateral que tuvo Milei en la Casa Blanca en octubre de 2025, al igual que en la visita de Bessent a Buenos Aires, quedó de manifiesto el acceso que tiene Milei y su círculo político a Trump y sus principales funcionarios.

Una posible derrota electoral de Trump y los Republicanos en las midterms de 2026 puede alterar las correlaciones de fuerzas en Washington y, por ende, recalibrar el tipo de apoyo y los instrumentos con un país como la Argentina. Ante ese escenario, el gobierno argentino no tiene un plan B.

Tanto Argentina como Brasil recibieron a inicios de abril de 2025 en el marco del “*liberation day*” una suba de aranceles del 10%, el *baseline*. Sin embargo los caminos se bifurcaron en la segunda mitad del año. Mientras Trump aplicó aranceles del 40% a Brasil y confrontó con Lula y las instituciones de Brasil, la Argentina comenzó a negociar un acuerdo comercial (White House 2025a) que ya tiene un *Framework*⁴ con compromisos comerciales. En el documento se señala que existe un

3. Desde 1971, en cuatro oportunidades el Tesoro de EE. UU. intervino directamente en mercados de cambios de terceros países. Japón (1998 y 2011), la UE (2000) y Argentina (2025).

4. Desde el primer día de su gobierno, Milei ha buscado firmar un TLC con EE. UU. a partir de una flexibilización del MERCOSUR, tipo de acuerdo que la visión mercantilista Trump no propone ni apoya. Ante la realidad en Washington, la Argentina buscó avanzar en negociar un acuerdo parcial donde, además de algunos compromisos arancelarios (excepciones al AEC del Mercosur), estén incluidos temas no arancelarios (propiedad intelectual, acceso a recursos naturales, facilitación de comercio, comercio digital, entre otros).

Economic Security Alignment y un marco para facilitar el comercio e inversiones en minerales críticos. En ese marco, con la administración Biden, el gobierno de Milei firmó un *MoU* con EE. UU. para fortalecer la cooperación en minerales críticos (US Mission Argentina 2024). En el contexto de fragmentación geoeconómica (Aiyar et al. 2023) y de búsqueda de cadenas de suministros seguras, Argentina —al igual que Brasil— adquiere una relevancia relativa.

Ahora bien, la estrategia de acoplamiento del gobierno de Milei no es con EE. UU. sino con el gobierno de Trump, de ahí su principal vulnerabilidad. La Argentina se quedó sin prestamista de última instancia⁵ y tuvo que aparecer la poco frecuente asistencia financiera del Tesoro de EE. UU. Hasta que el país no consiga volver a los mercados (fuerte baja del riesgo país) el modelo económico y la fortaleza política se sustenta en la expectativa del salvataje de Scott Bessent. Congresistas del Partido Demócrata se han mostrado en contra del apoyo financiero (Sánchez 2025), lo cual demuestra cómo el gobierno de Milei forma parte de la fuerte polarización política que hoy experimenta Washington⁶. Una posible derrota electoral de Trump y los Republicanos en las *midterms* de 2026 puede alterar las correlaciones de fuerzas en Washington y, por ende, recalibrar el tipo de apoyo y los instrumentos con un país como la Argentina. Ante ese escenario, el gobierno argentino no tiene un plan B.

BRASIL Y EL *HEDGING*: GARROTES Y RESILIENCIA NEGOCIADORA

Biden y Lula habían logrado, entre 2023 y 2024, una sinergia a nivel presidencial debido a sus agendas políticas polarizadas internamente, más allá de importantes divergencias en agendas particulares (Hirst & Valls Pereira 2024). El gobierno de Biden jugó un rol decisivo para desalentar el intento de golpe de Estado alentado por el bolsonarismo en enero de 2023. El regreso de Trump a la Casa Blanca representaba un desafío para la clara estrategia de *hedging* en la política exterior que implementó Lula III (Kalout & Sá Guimarães 2022; Spektor 2023) y para la construcción política doméstica por el empoderamiento externo brindado a la familia Bolsonaro.

La bifurcación de las estrategias externas con Argentina fue muy clara a partir de 2025. Con Lula III, Brasil apostó por reforzar el *Multi-Alignment*, buscando diversificar al máximo las relaciones exteriores y comerciales como una forma de evitar

5. Argentina ya cuenta con un programa vigente con el FMI, y el país tiene activado una línea de *swap* con el Banco Central de China, dos fuentes de financiamiento consideradas de última instancia, a las que se recurre cuando se cierran los mercados.

6. El intercambio en X entre el secretario del Tesoro Scott Bessent y la senadora Elizabeth Warren (octubre-noviembre 2025) se centró en el *swap* de divisas de hasta US\$20 mil millones del Tesoro de EE. UU. a Argentina (vía *Exchange Stabilization Fund*) para respaldar al gobierno de Milei. Warren lo denunció repetidamente como un “bailout” (salvataje) político para un aliado de Trump, que beneficiaba a *hedge funds* y Wall Street mientras ignoraba prioridades internas de EE. UU. (salud asequible, agricultores afectados, *shutdown* gubernamental). Pidió transparencia, criticó el secretismo y propuso frenarlo (incluso con un proyecto “No Argentina Bailout Act”).

las presiones de las grandes potencias, estrategia reforzada en el regreso de Trump (Stuenkel 2025). Durante 2025, el Presidente de Brasil realizó tres giras por Asia (marzo, mayo, octubre) visitando Japón, Vietnam, China, Indonesia y Malasia.

A diferencia de Argentina, donde el oficialismo consiguió *access point* a la Casa Blanca, quien logró un acercamiento, desde enero de 2025, fue el círculo de Eduardo Bolsonaro. Las medidas arancelarias y las sanciones a Alexandre de Moraes, juez del Supremo Tribunal Federal (STF) de Brasil, se explican en parte por esa capacidad de Lobby. A finales de julio de 2025 Brasil recibió los “garrotes”⁷ de Trump, con la particularidad de que no existía una demanda de tipo comercial sino de política interna: influir en las instituciones brasileñas sobre el proceso judicial a Jair Bolsonaro.

Ante la embestida de la Casa Blanca, el gobierno de Lula se mantuvo firme tanto en retórica como en la amenaza de retaliaciones⁸. A diferencia de otros actores que rápidamente se sentaron con Trump desde una posición de debilidad en una mesa negociadora (como, por ejemplo, la Comisión Europea), Lula entendió que las exigencias de Trump eran imposibles de cumplir, pero que en el fondo Washington tenía intereses estratégicos y de largo plazo sobre un actor que entra en la categoría de *Geopolitical Swing State* (Cohen 2023, Actis 2024b) en donde existían márgenes para negociar. Las desventajas de Brasil de la nula sintonía individual entre los presidentes (aspecto presente en Argentina con Milei) fue compensada con el peso estructural de Brasil en el hemisferio, la tradicional idea de *Pivotal State* (Chase, Hill & Kennedy 1996)

Las reservas estratégicas de Brasil en tierras raras (aún poco explotadas), en el contexto donde EE. UU. busca romper la dependencia con China, se convirtió en un tema central del vínculo bilateral. A la par que el Canciller Mauro Vieira busca abrir diálogo con los funcionarios de Trump (en especial con Marco Rubio), el poderío empresarial de Brasil logró el lobby que el gobierno no tuvo sobre Trump y la Casa Blanca.

7. Trump describió el juicio contra Bolsonaro como una “caza de brujas” y utilizó las sanciones como herramienta de presión (sanciones económicas y personales bajo la Ley Global Magnitsky), incluyendo aranceles del 40% a exportaciones brasileñas (vía el IEEPA) para influir en el STF. El objetivo era proteger intereses estadounidenses y apoyar a Bolsonaro, condenado a 27 años de prisión en septiembre de 2025 por el STF.

8. Lula amenazó con tomar represalias e invocó explícitamente la posibilidad de aplicar la Ley de Reciprocidad Económica (o Ley de Reciprocidad Comercial).

Las reservas estratégicas de Brasil en tierras raras (aún poco explotadas), en el contexto donde EE. UU. busca romper la dependencia con China, se convirtió en un tema central del vínculo bilateral. A la par que el Canciller Mauro Vieira busca abrir diálogo con los funcionarios de Trump (en especial con Marco Rubio), el poderío empresarial de Brasil logró el lobby que el gobierno no tuvo sobre Trump y la Casa Blanca. Por ejemplo, Joesley Batista, el mega empresario brasileño de Grupo J&F –que aportó para la campaña de Trump– fue un nexo para acercar posiciones entre Trump y Lula (Magalhaes 2026). Los aranceles sobre la carne brasileña representaron un duro golpe para la firma JBS, con gran penetración en el mercado de EE. UU. La capacidad de lobby de empresas brasileñas sobre la Casa Blanca no ha estado presente en la Argentina, mostrando la debilidad relativa en cuanto al fenómeno de las multilatinas. Por ejemplo, la empresa argentina Techint nunca logró incidir para lograr cuotas a las exportaciones de acero y aluminio desde Argentina en el marco del aumento de aranceles de Trump a esos bienes.

El encuentro bilateral entre Trump y Lula en Malasia (octubre de 2027) significó un nuevo momento de la relación bilateral que abrió una etapa de negociaciones, la cual concluyó con una modificación por parte de Trump de los aranceles impuestos⁹ y la eliminación de las sanciones a Alexandre de Moraes. A diferencia de Argentina, donde la negociación comercial tiene como norte un amplio acuerdo, el *deal* de Brasil fue un *rollback* de la posición tarifaria, sin otros compromisos comerciales. De manera simultánea, Brasilia y Washington comenzaron a explorar vías de cooperación en tierras raras, lo cual puede culminar con un acuerdo bilateral en la materia, en 2026 (Pooler, Hodgson & Stott 2026). Es dable recordar que en agosto la *Development Finance Corporation (DFC)* aprobó un préstamo de 465 millones de dólares para la mina Serra Verde en Goias –la única operación productiva de tierras raras de Brasil– y un desembolso de 5 millones de dólares para estudios de factibilidad (Bloomberg 2025). En tiempos de fragmentación geoeconómica, los minerales se convierten en un activo estratégico para Brasil y gran parte de Sudamérica.

REFLEXIONES FINALES

El regreso de Donald Trump a la Casa Blanca se convirtió en la principal variable sistémica con impacto en el devenir político de Argentina y Brasil, con implicaciones en la arena doméstica y de la inserción internacional. Considerando los vínculos interpersonales creados (con Milei y el bolsonarismo) y la centralidad de

9. Se excluyen del adicional 40% una amplia lista de productos agrícolas (238 códigos HTSUS + 11 categorías adicionales), incluyendo café, té, frutas tropicales y jugos, cacao, especias, bananas, naranjas, tomates, carne bovina, agua de coco, açai y otros. Estos ahora solo pagan el 10% *baseline* (o menos si aplican preferencias/exenciones previas como *Section 232* en algunos casos) (White House 2025b).

América Latina en la política exterior del nuevo mandato de Trump (algo no visible en Washington desde los años ochenta), no hay antecedentes en el siglo XXI de un primer año de mandato presidencial estadounidense tan influyente sobre el devenir político, económico e internacional de Buenos Aires y Brasilia. A su vez, la variable analizada se transformó claramente en una fuerza centrífuga sobre la relación bilateral de los dos principales países sudamericanos, dada la acentuación de percepciones antagónicas (Actis 2025).

En ese marco, el presente ensayo buscó evidenciar la bifurcación de los caminos de los gobiernos de Milei y Lula con relación a los EE. UU. de Trump a partir del análisis de distintos indicadores, los cuales se resumen en el siguiente cuadro:

	Argentina-Milei	Brasil-Lula
Estrategia externa frente a Trump II	acoplamiento	<i>hedging /multi-alignment</i>
Principal Instrumento aplicado por EE. UU.	zanahorias	garrotes
Sanciones aplicadas al país	ninguna	Sanciones a Alexandre Moraes y otros (Ley Magnitsky)
Aranceles recibidos	10% <i>baseline</i>	40% (con excepciones)
Tipo de negociación comercial	amplio acuerdo (<i>Framework On Reciprocal Trade And Investment</i>)	<i>deal rollback</i> (suavizar los aranceles vía IEEPA)
Acceso político al círculo decisorio de la Casa Blanca	amplio	restringido al oficialismo/ amplio hacia la oposición (Bolsonarismo)
Capacidad de lobby empresarial sobre la Casa Blanca	baja	amplia
Acceso a minerales críticos/ tierras raras	negociado	en negociación
Rol en la fragmentación económica	proveedor de materias primas	proveedor de materias primas + <i>geopolitical swing state</i>

Cuadro 1: Síntesis comparativa de los gobiernos de Milei y Lula frente a Trump II

Las líneas de este trabajo evidencian, en términos generales y con claridad, cómo la variable sistémica analizada se transformó en permisiva para el gobierno de Milei y en restrictiva para el gobierno de Lula. Sin embargo, más allá de usufructuar la estrategia de acoplamiento con obtener un salvataje financiero bilateral (la gran zanahoria de Trump a un país de la región), la Argentina enfrenta vulnerabilidades políticas y económicas que lejos están de resolverse, en el marco de un menor peso estructural en el sistema internacional. Por su parte, los garrotes de Trump a Lula no fueron inocuos dado los costos incurridos; pero la profundización del *hedging*, una buena lectura de la capacidad negociadora, el rol del sector privado y la condición de ser, además de una geografía proveedora de materias primas claves como Argentina, un actor con peso en el contexto de competencia entre grandes poderes (*geopolitical swing state*), le dieron resiliencia frente al contexto internacional adverso. 

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Brazil and the European Union: The State of Affairs and Perspectives
Flavio Celio Goldman & Gabriel Fernandes Pimenta

Brazil and the European Union: The State of Affairs and Perspectives

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Abstract: Cooperation between Brazil and the European Union has expanded across various areas despite structural constraints and divergent approaches. This article examines the interplay between institutional trajectories, Europe's evolving strategic posture and the intensification of political and sectoral cooperation with Brazil. Shared values and converging interests sustain a predominantly optimistic outlook, notably as the Mercosur-EU Agreement offers instruments to advance a more resilient and comprehensive bilateral agenda.

Keywords: Brazil-European Union relations; Mercosur-EU Agreement; trade; multilateralism; geopolitics.

Brasil e União Europeia: Situação Atual das Relações e Perspectivas

Resumo: A cooperação entre o Brasil e a União Europeia expandiu-se para diversos eixos apesar de restrições estruturais e abordagens divergentes. Este artigo examina a interação entre as trajetórias institucionais, a postura estratégica em evolução da Europa e a intensificação da cooperação política e setorial com o Brasil. Valores compartilhados e interesses convergentes sustentam uma perspectiva predominantemente otimista, principalmente porque o Acordo Mercosul-UE oferece instrumentos para promover uma agenda bilateral mais resiliente e abrangente.

Palavras-chave: relações Brasil-União Europeia; Acordo Mercosul-UE; comércio; multilateralismo; geopolítica.

The ties between Brazil and Europe rank among the most traditional in the country's foreign policy, as evidenced by the celebrations of bicentennial diplomatic relations with European countries between 2025 and 2026¹. Alongside this historical trajectory, contemporary elements of rapprochement have emerged, such as dense diplomatic engagement², significant economic exchange—the European Union is Brazil's second-largest trading partner³—and a positive perception of European countries among the Brazilian public (AtlasIntel 2024). Bilateral issues, such as exchanges of visits by heads of government and State, and regional matters, such as negotiations between Mercosur and the European Union, occupy media space and are the subject of public debate.

While important for underscoring the significance of the link between the two sides of the Atlantic, these elements constitute only the starting point for a more sophisticated approach to relations between Brazil and the European Union, which is the focus of this paper. To achieve this objective, we will establish the conceptual foundations for the analysis, with particular attention to the political framework and social trajectories of the parties involved. We will then present the contemporary strategic context of Europe, taking into account elements of interaction between the region, the institutions of regional integration, and other relevant global actors. Finally, we will address the current status of relations between Brazil and the European Union, considering both bilateral and regional-scale elements in order to develop perspectives on the subject⁴.

CONCEPTUAL CONTRIBUTIONS

The characterization of a region as an object of analysis combines geographic, institutional, and intersubjective elements (Fawn 2009). In this sense, the European space can be characterized along three dimensions: the countries of the region,

1. During this period, Portugal, the United Kingdom, the Holy See, Sweden, Austria, and the Netherlands celebrated 200 years of diplomatic relations with Brazil.

2. Brazil maintains resident embassies in 36 European capitals, while Brasília hosts 37 diplomatic missions from the region.

3. According to data from the Ministry of Development, Industry, Trade and Services (MDIC), trade flows between Brazil and Europe reached US\$ 132.9 billion in 2025, accounting for 18% of Brazil's total exports and 25% of its total imports.

4. This text was written in a personal capacity and does not necessarily reflect official positions of the Ministry of Foreign Affairs.

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with which relations are maintained on a bilateral basis; the set of countries framed by shared characteristics, such as spatial contiguity, high average income, and, to a large extent, adherence to liberal values; and the institutions that bind the European continent together, such as the European Union and NATO. Europe thus constitutes a relevant center of the international system, both because of the capabilities of the countries in the region—acting on a bilateral basis or in a coordinated manner—and because of the normative and strategic reach of its institutions (Bargués et al. 2023; Wunderlich 2025). The analytical focus on the European Union fits within the third dimension and supports the approach by providing elements such as State membership and the existence of formal regional integration arrangements, which simplify the discussion of what constitutes the region.

The analysis of the relationship between Brazil and the European Union—which might appear inconsistent insofar as it involves a State and a regional integration arrangement—is grounded not only in formal aspects but also in features of the historical development of the parties. The formation of the Brazilian State occurred in a context of the predominance of the European nation-State model, with centralized formal institutions as the dominant political form (Acharya & Buzan 2019). In this respect, Brazil’s institutional framework and the local perspective on international institutions, such as international law and diplomacy, favored relations with European States, given the convergence of values and practices since the outset of Brazil’s independent trajectory (Lopes 2025). Beyond this initial socialization within the system of States, the centrality of European States as global powers established the relationship on economic and strategic foundations. Accordingly, “Europeanism” can be identified as the preferred orientation of Brazilian foreign policy until the 1910s (Santos 2004;

Bilateral issues, such as exchanges of visits by heads of government and State, and regional matters, such as negotiations between Mercosur and the European Union, occupy media space and are the subject of public debate. While important for underscoring the significance of the link between the two sides of the Atlantic, these elements constitute only the starting point for a more sophisticated approach to relations between Brazil and the European Union (...).

Ricupero 2017). Even after the mid-twentieth century, with the consolidation of American and Asian powers as central actors in the international system, already established ties—understood through the lens of path dependence—help explain the persistence of Europe as a mandatory arena of Brazilian foreign policy (Pierson 2004; Fonseca Júnior 2011). In formal terms, the analysis is sustained by the fact that the European Union is not only a formal regional integration arrangement but also a subject of international law, capable of maintaining diplomatic relations (Forteau et al. 2022; Mangiameli 2012).

THE EUROPEAN STRATEGIC CONTEXT

Over the past thirty years, the European strategic landscape has consolidated around the European Union as the continent's principal political reference. This institutional center of gravity has functioned simultaneously as a forum for solving internal crises—such as the 2008 financial crisis and the 2015 migration crisis—and as a pole of attraction for countries in the immediate neighborhood, encompassing a belt stretching from the Western Balkans to the Caucasus.

More recently, the European strategic environment has been affected by a set of interrelated external factors. Notable among these are China's rise across multiple domains, in direct competition with the United States; the outbreak of the war in Ukraine; the strengthening of populist and extremist trends within internal political systems; risks of instability in global supply chains, as it happened during the coronavirus pandemic; and the erosion of confidence in the security umbrella provided by the United States. In response, the European Union has been reassessing its approach to strategic positioning in light of an unstable global and regional environment, as reflected in the program for the first half of 2026 prepared by the Cypriot Presidency of the Council of the European Union (Council of the European Union 2026).

This strategic reassessment has prompted the pursuit of initiatives aimed at raising the region's degree of autonomy. Among these, particular emphasis has been placed on addressing energy dependence on Russia, dependence on supply chains linked to China, and security dependence on the United States despite the continued role of NATO, through programs such as RESourceEU, REPowerEU, and Horizon Europe (European Commission 2022; 2025a; 2025b).

In the field of security, the conflict in Ukraine led historically neutral countries, such as Sweden and Finland, to opt for NATO membership, reshaping the continent's security landscape. The protracted duration of the conflict has prompted adjustments in the positions of European countries, which, without abandoning

support for Ukraine, have shown growing interest in proposals for a political solution of the matter, such as those put forward by the “Friends of Peace” Group, co-chaired by Brazil and China, or in serving as co-guarantors of the potential outcome of negotiations among the United States, Russia, and Ukraine.

In parallel to China’s expanding engagement beyond its immediate neighborhood, associated with the Belt and Road Initiative, the European Union has shown interest in broadening its extraregional presence, with focus on energy, environmental issues, critical minerals, and digitalization. The European response to Beijing’s initiative has materialized in the Global Gateway program, which foresees the mobilization of up to €300 billion by 2027 for sustainable projects, with the aim of positioning the EU as a reliable partner for the Global South (European Commission 2023).

Meanwhile, a perception has taken hold among European actors that the intensification of strategic competition between the United States and China poses a growing risk to the region’s political, security and economic interests. The view that a multipolar world would better serve these interests is widely shared and is reflected, for example, in the support expressed by France and the United Kingdom for reform of the UN Security Council and for Brazil’s admission as a permanent member (République Française 2024; Foreign and Commonwealth Office 2014). The debate on the need for European strategic autonomy emerged during the first Trump administration in 2017 and has gained significant momentum since then. In this context, the European Union adopted the Strategic Compass in March 2022, the first document to articulate a common vision among the Member States on defense, setting out objectives for the medium term (European Union 2022).

On the domestic political front, the most evident risks to the stability of the European Union seem to stem from the rise of extremist, populist and sovereigntist parties, often associated with growing opposition to migration and to the very foundations of European integration. Rising identity- and migration-related tensions tend to fuel these forces, posing risks to democratic stability and to mechanisms of interstate cooperation. In this regard, international cooperation in fields such as defense of democracy and information integrity has been identified as a priority for a number of European countries.

INITIATIVES AND PROSPECTS

Brazil shares with the European Union convergent perspectives regarding the need to defend democratic institutions, the centrality of sustainable development and the role of international law as the foundation of a stable international system capable of promoting security and prosperity for its members. This shared set of values has served as the cornerstone for deepening interregional relations. Added to

this normative convergence, at the level of opportunities generated by the current strategic environment, lies the common search by Brazil and the European Union for new partnerships and for strengthening capabilities in areas such as trade, energy, sustainable development, digitalization, science, technology and innovation.

Europe's renewed interest in Latin America—and in Brazil in particular, seen as an essential partner in addressing global challenges—as well as Brazil's reconnection with its traditional partners after 2023 are reflected in the intensification of political dialogue. At the regional level, two CELAC–EU summits have been held within a two-year period⁵, after an eight year hiatus. At the bilateral level, the framework of the Brazil-European Union Strategic Partnership structures political dialogue and sectoral cooperation (Council of the European Union 2007). The visit of the President of the European Commission, Ursula von der Leyen, to Brasília in June 2023 resumed frequent high-level contact between Brazilian and EU leaders, which continued at events such as the G20 Summit in Rio de Janeiro and COP 30 in Belém do Pará. Brazil and the EU keep regular institutional dialogues in key areas of cooperation such as human rights, science and technology, digital economy and energy.

Brazilian diplomatic discourse has been adamant about the interest in strengthening cooperation with the EU. President Lula has stated this clearly in different occasions, notably during his inauguration speech in January 2023 and during his speech at the opening of the 80th United Nations General Assembly, in September 2025, in which he formulated his view on a multipolar order founded in multilateralism (Lula da Silva 2023).

Europe's renewed interest in Latin America—and in Brazil in particular, seen as an essential partner in addressing global challenges—as well as Brazil's reconnection with its traditional partners after 2023 are reflected in the intensification of political dialogue.

The association agreement between Mercosur and the European Union, signed in January 2026, represents the culmination of convergences between Brazil and Europe. Beyond the agreement's trade significance, President Lula highlighted its political and strategic outreach by framing it as a response of multilateralism against isolationist trends (Lula da Silva 2026). Taken as a whole, the 32 countries of the Mercosur-European Union Agreement encompass approximately 720 million citizens, with a combined GDP of more than US\$ 22 trillion. The agreement will

5. In July 2023, in Brussels, and in November 2025, in Santa Marta.

broaden access to strategic markets to Brazilian companies and provide common rules, allowing for the expansion of value chains across the Atlantic.

Notwithstanding advances in rapprochement, some challenges persist in the relationship between Brazil and the European Union, made evident during the approval process of the agreement between the integration blocs. Among them are reluctance by certain sectors to deepen economic ties and different technical standards that might retard the fulfillment of commercial commitments. An example is provided by mechanisms perceived by the Brazilian side as protectionist, such as the European Union Deforestation Regulation (EUDR) and the Carbon Border Adjustment Mechanism (CBAM). The EUDR imposes verification requirements on products exported to the EU to ensure deforestation-free supply chains, while the CBAM consists of a tariff on certain products based on the greenhouse gas emissions associated with their manufacturing. Both instruments are based on assumptions, criteria, and processes unilaterally defined by the EU and subject to criticism. They are viewed by the Brazilian government and business stakeholders as examples of unilateral regulation that restrict regulatory autonomy and create trade barriers for Brazilian products, while disregarding local standards of environmental governance.

The relationship between Brazil and the European Union rests on solid foundations, giving rise to cautious optimism regarding its evolution. Historically dense ties, normative convergence around democracy, sustainable development, and multilateralism, as well as the growing institutionalization of political and economic dialogue, provide favorable conditions for long-term interaction. The association agreement between Mercosur and the European Union represents a relevant milestone in this process.

Geopolitical sensitivities also highlight different perspectives between both sides. The reactions of the Brazilian government and most EU countries to the events in Venezuela on January 3, 2026 show how Brazil and the European Union framed their responses accordingly to their respective strategic contexts, while still revealing a shared commitment to multilateral principles.

FINAL CONSIDERATIONS

The relationship between Brazil and the European Union rests on solid foundations, giving rise to cautious optimism regarding its evolution. Historically dense ties, normative convergence around democracy, sustainable development, and multilateralism, as well as the growing institutionalization of political and economic dialogue, provide favorable conditions for long-term interaction. The association agreement between Mercosur and the European Union represents a relevant milestone in this process. In a context marked by geopolitical instability and economic fragmentation, the partnership between actors that share—albeit not uniformly—common references across several fields of international governance constitutes a valuable foreign policy asset.

The maintenance of this relationship will depend on the ability to manage the challenges that arise from closer ties. They indicate that the partnership is not free from friction, requiring continuous political engagement and structured dialogue in order to accommodate the priorities of both parties. Differences, however, do not negate the potential of the relationship. On the contrary, if addressed with the necessary diplomatic investment, they may foster more mature forms of cooperation between Brazil and the European Union in an increasingly complex international environment. ■

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Brazil and European Union flags in puzzle pieces. Image: Shutterstock.

Brazil-European Union Relations: Seeking New Opportunities
Günther Maihold

Brazil-European Union Relations: Seeking New Opportunities

Günther Maihold

Abstract: Against the backdrop of the signing of the EU-Mercosur Agreement, the significance of the Brazilian-European partnership has also increased. To achieve greater complementarity, Brazil and the EU must develop a broader foundation of understanding and cooperation, particularly in light of geopolitical threats and upheavals. Despite upcoming elections and a variety of international challenges, it is important to build on existing initiatives and provide new impulses. As preferred partners, business and society must also drive bilateral and bi-regional relations in order to achieve sustainable effects in new strategic areas.

Keywords: Brazil; European Union; partnership; Mercosur.

Relações Brasil-União Europeia: em busca de novas oportunidades

Resumo: Tendo como pano de fundo a assinatura do Acordo UE-Mercosul, a importância da parceria Brasil-Europa também aumentou. Para alcançar maior complementaridade, Brasil e UE devem desenvolver uma base mais ampla de entendimento e cooperação, particularmente em vista das ameaças e convulsões geopolíticas. Apesar das próximas eleições e de uma série de desafios internacionais, é importante aproveitar as iniciativas existentes e dar novos impulsos. Como parceiros preferenciais, o setor empresarial e a sociedade também devem impulsionar as relações bilaterais e birregionais para alcançar efeitos sustentáveis em novas áreas estratégicas.

Palavras-chave: Brasil; União Europeia; parceria; Mercosul.

THE EU'S NEW PARTNERING INITIATIVE WITH THE REST OF THE WORLD

On January 17, the EU and the Mercosur States finally signed the association agreement that had been under negotiation for over 25 years. The 27 Member States had previously adopted two resolutions, which were finally endorsed by Italy as well, authorizing the signing of the EU-Mercosur Partnership Agreement (EMPA) and the Interim Trade Agreement (iTa) between the two parties. However, France, Poland, Austria, Ireland and Hungary voted against the EMPA, with Belgium abstaining. Budapest opposed the iTa, with Vienna and Brussels abstaining. This tortuous process has once again shown the difficulty of reaching common positions at the EU's governmental level, not to mention the protests involving tractors and the agricultural sector in Brussels and many other locations across Europe.

Last-minute negotiations on the Association Agreement between the EU and Mercosur have shown that the EU must make hurtful compromises and think beyond short-term national interests if it is to forge stronger partnerships and increase its global strength—a very challenging task given that several governments are under strong pressure at home. However, as German Chancellor Friedrich Merz stated, the EU-Mercosur agreement “represents a milestone in European trade policy and sends a strong signal of our strategic sovereignty and ability to act”. Although the European Parliament has asked the European Court of Justice for a legal review, it can be assumed that the trade agreement will provisionally enter into force.

The re-elected Commission President, Ursula von der Leyen, has set out her ambitions for Europe's foreign policy in her second term: the goal is to “leverage” the EU's “power and partnerships,” recognizing that the EU's influence on countries outside Europe is weaker than originally expected. The so-called “Brussels effect” of EU legislation (Bradford 2020), which assumes that EU regulations and laws will be emulated globally, is limited in some areas. Some of the legislation that the EU has passed in the context of the Green Deal has caused irritation among many of its global partners, whether it be the Carbon Border Adjustment Mechanism (CBAM) or, even more so, the EU deforestation initiative. The Commission is presenting the Global Gateway initiative—despite its internal heterogeneity—as an important tool

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in EU partnership policy, with EU delegations playing a key role in promoting it globally. The EU recognizes that its relations with global partners such as Brazil must be based on more equal partnerships. Von der Leyen's political guidelines state that the EU needs to "listen to and respond to the concerns of our partners affected by European legislation, particularly those relating to the European Green Deal" (von der Leyen 2024, 28). The EU and Brazil are collaborating on two main priorities: the Green Deal and digital transformation. These initiatives include energy, the green transition and digital connectivity. Additionally, a multi-country project on electromobility and transport is being conducted with Brazilian participation.

In order to defend its values in a changing world, the Union "must change the way we act. We must look for new opportunities wherever they arise. This is the moment to engage beyond blocs and taboos," von der Leyen added in her 2025 address to the World Economic Forum (European Commission 2025b). The only card the EU can play is accountability. "With Europe, what you see is what you get," stressed the EU Commission President. "We play by the rules. Our deals have no hidden strings attached". However, a recent study has shown that European international partnerships suffer from "hallow promises, too little substance," despite these kinds of agreements being a political priority, "they lack legal force, are fragmented, non-transparent, and, above all, underfunded" (Koch et al. 2025, 19).

ENHANCED VARIETIES OF PARTNERSHIPS: CONGRUENCE AND COMPLEMENTARITY

The European partnership model has certainly changed over time. At their first summit on June 28, 1999, in Rio de Janeiro, the EU and the States of Latin America convened in the final declaration "a strategic partnership". Since then, this term has dominated the interpretation of mutual foreign policies, despite never being defined in a general and binding way (Lazarou & Edler 2012, 36 ss.). Brazil has been a strategic partner of the EU since 2007 (European Commission 2007), a relationship that was formalized at the first EU-Brazil summit, upgrading diplomatic relations beyond the 1992 framework agreement. This strategic partnership has been reinforced by strategic partnerships between EU member countries and Brazil. Over the years, the EU has been trying to renew these special relations with increasingly descriptive terms, such as "enhanced" or "even stronger" partnerships. Ultimately, this endless discourse on partnerships essentially relies on four central elements:

- political cooperation in the sense of coordinated action in certain areas or toward certain actors;
- supported by shared intentions and objectives;

- ideally based on equal rights and obligations;
- and bound by certain rules of exclusivity while reducing competition (Maihold 2009, 194-195).

These elements have been described in various ways, such as “equal partnerships” or “value-based collaborations,” but efforts to maintain this mutual appreciation continued at different levels of economic, social, and cultural understanding, even during periods of political tension (2019-2023).

During his visit to Brazil from May 27 to 29, 2025, the President of the European Council, António Costa, emphasized in a keynote address at the inaugural EU-Brazil Investment Forum that “Brazil is not just a close friend, it is a strategic partner for the EU—a global player and a key ally in promoting democracy, multilateralism, and shaping a more just and sustainable world” (Costa 2025). However, the EU’s announcements of projects under the Global Gateway initiative, intended to increase its engagement in Brazil, are primarily motivated by geopolitical considerations. The partnership approach requires an adequately funded, proactive, long-term strategy, rather than short-term reactivity. Europe’s strategic vision for cooperation with Brazil remains vague and inadequately communicated, as summarized in a recent evaluation (Könnecke 2024).

European foreign policy is currently striving to establish new partnerships around the world and refresh existing ones. Given the emphasis placed on the importance of the “Team Europe approach,” which involves closer collaboration between EU member States and development banks, the partnership approach must also be redesigned.

Looking at Germany, various ministries are pursuing their specific sectoral interests and offering international partnerships in areas such as raw materials, energy, health and migration in a competitive way. Recently, however, a new category has been added to Germany’s partnership portfolio. “Desired or preferred partners” are those with whom a higher-value connection exists or is to be established, going

European foreign policy is currently striving to establish new partnerships around the world and refresh existing ones. (...) In its new partnership approach, the EU will certainly consider normative compatibility and shared values when building long-term partnerships, in addition to mutual benefit and the Union’s own interests.

beyond the standard, mandatory partnerships that define the established canon of foreign alliance partners. Desired partnerships thus go beyond the need for “reliable partners” (e.g. in supply chains), who primarily offer certainty of expectations and crisis resilience—because one wants to know “where one stands with them”. In its new partnership approach, the EU will certainly consider normative compatibility and shared values when building long-term partnerships, in addition to mutual benefit and the Union’s own interests. However, given the complexity of current international political dynamics, as well as Europe’s own history of double standards, its current democratic shortcomings (e.g. populism and unfair financial and economic structures), and the legacy of colonialism, the EU must avoid imposing its values through pressure or moralizing. The EU authorities’ fundamental papers, including the Strategic Compass (Council of the European Union 2022) and subsequent progress reports, as well as the White Paper on European Defence (European Commission 2025), demonstrate the EU’s clear preference for asserting itself as a sovereign actor capable of defending its interests and values alongside its partners.

The search for desired partners follows a dual pattern of congruence and complementarity (Maihold 2015). In congruent relationships, commonalities resulting from projecting one’s self-image onto the other person are decisive in defining a certain standard of status homogeneity. In contrast, complementary relationships seek a suitable counterpart in international politics and economics, accepting relationships with clear status differences. However, both desired partner profiles are characterized by the existence or prospect of sufficient reciprocity of expectations in the relationship, as evidenced by the absence of false or contradictory expectations on either side. The counterpart must therefore possess the ability to develop ideas about the desired partnership and overcome or adapt to possible differences in status.

THE BRAZIL-EU PARTNERSHIP

Following the European Commission’s statements on its “preferred partners,” the respective challenges can be outlined by considering Brazil as a congruent partner. Brazil values the EU as a reliable partner in terms of foreign direct investment, promoting democracy and human rights, and climate cooperation. For a long time, Brazilian diplomats sought to build closer relations with the EU in order to counterbalance US hegemony, which lasted until the early 1990s. Despite strong cultural and historical ties, as well as shared norms and values such as democracy and human rights, Brussels failed to prioritize relations with Brazil. Under the 2007 strategic partnership agreement, the EU states that it regards Brazil as one of its

most important partners in international forums. However, any diplomatic efforts have been restricted to short-term, sporadic bursts around summit meetings. The EU's frequently Eurocentric stance has made it difficult to establish a sustainable, mutually beneficial partnership. Furthermore, regarding the preferred partnership with Mercosur, which is considered a like-minded region on the global stage, it is clear that partnerships involving several countries require a politically complex approach from EU policymakers and member States.

With regard to Brazil, during President Lula da Silva's visit to Brussels in June 2023 (European Commission 2023), and during the cabinet negotiations with the German government in December 2023, which led to the agreement of a "Partnership for a socially just and ecological transformation" (Brasil 2023), both sides once again emphasized their desire for a mutually beneficial partnership. The two countries have demonstrated a high level of reciprocity and are considered congruent partners with regard to their shared positions on international policy issues (with a view to a rules-based order), although they have divergent views on international conflicts such as those in Ukraine and Gaza. Despite their size difference, the two countries have similar statuses. A shared approach to regulation and governance between the partners is advantageous, facilitating cooperation and building on decades of trust despite global competition, thereby minimizing access costs. This also applies to raw materials policy, in which Brazil is one of Germany's strategic suppliers, not least due to its substantial reserves of strategic natural resources.

During her visit to Brazil on January 16, 2026, the President of the European Commission stated that "Europe and Brazil are moving towards a very important political agreement on critical raw materials. This agreement will govern our joint investment projects in lithium, nickel, and rare earths. This

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is crucial for our digital and clean energy transitions. It will also strengthen our strategic independence in a world where minerals are increasingly being used as instruments of coercion” (European Commission 2026a). Following the announcement of the EU-Mercosur agreement, the Brazilian President made clear that “we want to produce and sell industrial goods with higher added value,” indicating that the “eternal role” of commodity exporters is coming to an end (Brasil 2026a). The guiding principle is to create greater value in Brazil by including components such as training skilled workers, academic cooperation and technological exchange, in addition to pure investment.

With Brazil and Mercosur as a preferred partner for strengthening economic ties and working together towards a climate-neutral future, the question arises as to whether this type of partnership is a viable instrument, beyond positioning one’s own alliance when searching for new partners. It quickly becomes clear that international competition fundamentally alters the nature of desired partnerships, given the diversity of interests represented, which either prevents close relationships or means they are only formed tactically. Desired partners who share similar views on many issues, such as Brazil, India or South Africa, cannot simply be classified and co-opted for an agenda that prioritizes maintaining the international order when they themselves are calling for reform of this order. European and German foreign policies have experienced such disillusionment time and again, but the US’s depredation of norms (Panke & Petersohn 2027) provides an effective incentive to maintain standards of international behavior based on multilateralism and mutual respect. By hedging against uncertainty and economic coercion, Brazilian-European cooperation can set an example for other countries in the region, helping them to overcome the challenging circumstances of current foreign policy-making in the Western hemisphere.

For foreign policies to develop a “preferred partner” program with recognizable added value, there is an urgent need to consolidate the cooperation instruments distributed among various departments in relations with respective countries, in order to create added value that demonstrates the benefits of their presence on the international stage.

When it comes to the role of the EU and its member States in international politics, it is clear that the number of preferred partners must be strictly limited if

desired levels of closeness and intensity in relations are to be secured or developed. Another variable is that politicians often look in the wrong places and rely on “preferred partners” who only meet this standard on the surface. This means that disappointment is inevitable if the concept of the “preferred partner” is used excessively. For foreign policies to develop a “preferred partner” program with recognizable added value, there is an urgent need to consolidate the cooperation instruments distributed among various departments in relations with respective countries, in order to create added value that demonstrates the benefits of their presence on the international stage.

OPENING UP NEW WINDOWS OF OPPORTUNITY

Strategic partnerships require continuous adaptation and renewal in changing contexts, especially if they strive for a certain degree of exclusivity and congruence. In view of the US imperial political approach and the associated fragmentation of the international order, the European partnering approach must also present substantial proposals for the international order’s formation. This requires continuous dialogue that goes beyond invoking the past and puts controversial points of view on the agenda. The Brazilian President’s call to be guided “by pragmatism, to overcome ideological differences and build solid and positive alliances within and outside the region” (Brasil 2026b) is an important guideline in this regard. Exemplary cooperation in the exploitation of raw materials, which allows both sides to make joint technological advances, is just as suitable for this as the establishment of a global trade system and financial order that takes into account the economic needs of the Global South. If steps are taken in this direction, then the aspiration for a congruent partnership can be fulfilled, and the strategic nature of the relationship between Brazil and the EU as a “preferred partnership” can be demonstrated. When the President of the European Commission speaks of “a new form of European independence as a structural imperative” (European Commission 2026b), she does not mean decoupling from strategic partners, but rather deepening mutual relations—even if the image of a first-mover advantage for Europe seems a little exaggerated.

Amid controversial domestic debates and in the run-up to the 2026 elections, Brazil is at the moment not expected to take on a leading role in Mercosur or in shaping the Brazilian-European partnership, given the limited political resources available. It is therefore important to build on existing approaches and set new priorities that will provide a better foundation for Brazil’s involvement in bilateral and bi-regional contexts. The European Union is also embroiled in numerous disputes, not least with its North American partner, the US, which is distancing itself ever more from

the shared principles of a multilateral, rules-based order. In view of these adverse conditions, businesses and societies in Brazil and Europe must take action to develop and strengthen joint initiatives. Some of these approaches are already underway, while others require combined efforts to be driven forward if Brazil and the EU are to realize the potential of their partnership and develop sustainable initiatives. One clear message from past events to all actors in the current geopolitical turmoil is that if the EU and Brazil cannot deliver on their promises, they cannot expect other countries to do so.

One of them is the continuation of the investment dialogue launched in 2025 with a Letter of Intent between ApexBrasil and the EU. This dialogue fosters sustainable investment that is aligned with Brazil's Ecological Transformation Plan and the EU's Global Gateway. The second EU-Brazil Investment Forum, planned for 2026, will provide another opportunity to engage in new projects within the framework of a structured investment dialogue focusing on sustainable development. As the EU has recently adopted a de-risking strategy aimed at securing its supplies in key strategic sectors, including clean technologies and critical raw materials, new areas must be discussed, such as higher-value production strategies in Brazil and supply chain management between Brazil and the EU. Additionally, the launch of an EU-Brazil Future Affairs Forum on digital technology, announced in 2025, will cover areas such as defense technology, sustainability and digital transformation, as well as their impact on global logistics and security, alongside other strategic dialogues. These areas of cooperation could be the most promising for the future, rendering the partnership between Brazil and the EU complementary, broader and stronger, provided the parties are serious about being partners of choice. 

One clear message from past events to all actors in the current geopolitical turmoil is that if the EU and Brazil cannot deliver on their promises, they cannot expect other countries to do so.

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F-39 Gripen above Rio de Janeiro, Brasil. Copyright Saab AB. Photo: Saab AB.

Choosing Cooperation: The Strategic Impact of Brazil's Gripen Acquisition

Karin Wallensteen

Choosing Cooperation: The Strategic Impact of Brazil's Gripen Acquisition

Karin Wallenstein

Abstract: The Gripen partnership between Brazil and Sweden illustrates how one strategic deal can transform bilateral relations—deepening industrial cooperation, fostering political dialogue, and strengthening ties through technology transfer and co-production. Today, the EU-Mercosur Agreement offers a systemic shift toward large-scale trade integration, investment flows, and institutional cooperation between two continents. In an era of rivalry and unilateralism, this agreement signals a clear choice for partnership and rules-based trade.

Keywords: Brazil; EU-Mercosur agreement; Gripen; Sweden; spheres of interest.

Optando pela cooperação: o impacto estratégico da aquisição de caças Gripen pelo Brasil

Resumo: A parceria Gripen entre o Brasil e a Suécia ilustra como um acordo estratégico pode transformar as relações bilaterais – aprofundando a cooperação industrial, fomentando o diálogo político e fortalecendo os laços por meio da transferência de tecnologia e da coprodução. Hoje, o Acordo UE-Mercosul oferece uma mudança sistêmica rumo à integração comercial em larga escala, aos fluxos de investimento e à cooperação institucional entre os dois continentes. Em uma era de rivalidade e unilateralismo, este acordo sinaliza uma clara escolha pela parceria e pelo comércio baseado em regras.

Palavras-chaves: Brasil; acordo UE-Mercosul; Gripen; áreas de interesse; Suécia.

TWO CENTURIES OF PARTNERSHIP

In 2026, Sweden and Brazil celebrate 200 years of diplomatic relations—a partnership that began politically in 1826 when Sweden recognized Brazil's independence and the two countries initiated an exchange of envoys.

Over the past two centuries, this relationship has evolved significantly, anchored in a foundation of strong economic ties, and driven by major Swedish companies operating in Brazil. Brands such as Electrolux, Scania, Tetra Pak and Volvo are so common across the country that many Brazilians may not even realize they are Swedish. The same is true for digital platforms and games like Spotify, Minecraft, and Candy Crush—services that seem to belong everywhere. Yet in terms of origin and innovation, they too are products of Sweden.

Individuals have played important roles in shaping this vast and multifaceted bond, and though there are many examples, only four will be named here: Emperor Pedro II installed an Ericsson telephone in his palace in the late 19th century, symbolizing early technological exchange between our nations. Football legend Marta Vieira da Silva captured hearts in both countries, boosting the popularity of women's football. Industrialist Marcus Wallenberg continues to advance business cooperation. And the São Paulo raised queen of Sweden, Her Majesty Queen Silvia, added a personal—and romantic—dimension to our bilateral ties. These examples reflect the depth and diversity of a relationship that blends commerce, culture, and shared values.

Among the many milestones, Brazil's 2014 decision to purchase 36 Saab Gripen (F-39) fighter aircraft stands out. One important factor was the mutual benefits of the Gripen program; a deal that demonstrates the power of trust-based collaboration. More than a defense contract, it symbolized strategic alignment, driving technology transfer,

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co-production, and long-term political dialogue. The Gripen program extends far beyond Brazil's purchase of Saab fighter aircraft; it has developed into a comprehensive industrial, technological, and training partnership between the two countries. This cooperation is built on two interconnected pillars: the industrial collaboration between Sweden's Saab and Brazil's Embraer, and the operational partnership between the *Força Aérea Brasileira* and the Swedish Air Force, which together drive joint system development, pilot and engineer training, and the transfer and growth of advanced aerospace technologies. At the heart of this effort sits Embraer's Gavião Peixoto facility, home to Gripen's Brazilian assembly line.

The Gripen program extends far beyond Brazil's purchase of Saab fighter aircraft; it has developed into a comprehensive industrial, technological, and training partnership between the two countries. This cooperation is built on two interconnected pillars: the industrial collaboration (...), and the operational partnership (...).

The Gripen program strengthened Sweden's reputation as a reliable partner and simultaneously positioned Brazil as a key player in advanced aerospace manufacturing. For Brazil, it fit into the country's broader ambition to be a regional power, upgrade its industrial base and increase technological sovereignty. For Sweden, at the time, it was the biggest export contract to date. For Brazil, the contract is likely the most ambitious defense-industrial partnership in the country's history. Brazil usually ranks first, second or third when it comes to Sweden's annual defense material exports—entirely because of Gripen.

This achievement illustrates how targeted cooperation can deliver transformative results—an important lesson as Sweden and the EU look to seize the broader opportunities offered by the EU-Mercosur Agreement.

EU-MERCOSUL: BUILDING BRIDGES

With the January 17 signature of the EU-Mercosur Partnership Agreement (EMPA) and of the Interim Trade Agreement (iTA) between the EU and Mercosur, there is ample opportunity to lift cooperation to a new level, for EU as a group, as well as for Sweden as a country. Once in force, these two agreements will establish a framework for political dialogue, cooperation and trade relations within a modernized

and comprehensive partnership. The agreement lays the foundation for establishing one of the world's largest free-trade zones by population, encompassing a market of more than 700 million people.

Sweden, a highly export-oriented economy, has consistently supported the EU-Mercosur Agreement, with broad cross-party backing in parliament. This support is rooted in the principles of mutually beneficial, rules-based trade, but also in Sweden's own interests—lower tariffs on machinery, vehicles, telecom equipment, and pharmaceuticals, reduced bureaucracy, and improved market access for Swedish companies already deeply embedded in Brazil. While trade between our countries is important and growing, the biggest Swedish impact on Brazil's economy remains the presence of over 200 Swedish companies, several of them with long-standing operations in Brazil and significant production, employing tens of thousands of people.

The long-standing presence of Swedish firms in Brazil helped create the conditions for an ambitious project such as the local production of Gripen aircraft by Embraer, a partnership that was both natural as well as strategically significant.

The EU-Mercosur Agreement is a representation of Europe's interest in Latin America. This is not a new revelation. The European Union, as a single economic bloc, is Brazil's largest foreign investor. EU foreign direct investment (FDI) stock in Brazil has grown steadily in recent years, reaching approximately € 312 billion by the end of 2023, which represents a significant share of Brazil's total inward FDI. This makes the EU the most important external investor group in the country, ahead of other major players such as the United States. These figures are based on Eurostat data and official EU reports, which consistently highlight Brazil as the EU's top investment destination in Latin America.

Trade goes two ways. Brazilian agricultural products such as beef, coffee, poultry, sugar, ethanol, juice and fruit will gain improved access to the EU market under

The EU-Mercosur Agreement is not only about trade—it is a commitment to sustainable development. By embedding environmental and climate obligations into the framework, including the implementation of the Paris Agreement and measures to prevent deforestation, the agreement ensures that economic growth aligns with ecological responsibility.

reduced tariffs. Brazilian industrial goods, including automotive parts and machinery, will face fewer trade barriers, making them more competitive in Europe. With clearer rules and reduced red tape, Brazil will attract more European investments in infrastructure, renewable energy, and high-tech sectors. Brazilian companies will benefit from easier participation in EU supply chains, especially in automotive, aerospace, and pharmaceuticals. Increased trade and investment flows are expected to generate employment and stimulate innovation in Brazil's manufacturing and service sectors.

The EU-Mercosur Agreement is not only about trade—it is a commitment to sustainable development. By embedding environmental and climate obligations into the framework, including the implementation of the Paris Agreement and measures to prevent deforestation, the agreement ensures that economic growth aligns with ecological responsibility. It incentivizes green investment, promotes clean technologies, and strengthens Brazil's capacity to lead on sustainability.

Another reason to highlight the importance of the EU-Mercosur Agreement extends beyond the borders of Brazil and the EU. At a time of intensifying global competition, when unilateralism and decoupling seem to carry more weight—we choose cooperation over confrontation. Rather than transactional approaches and rivalry, we build bridges.

UN CHARTER: COOPERATION, NOT COERCION

This choice must also be understood against the backdrop of dramatic geopolitical shifts in recent years. In Europe, Russia's illegal full-scale invasion of its peaceful neighbor Ukraine in 2022 shattered the security architecture built during the decades since the Helsinki Conference on Security and Cooperation in 1975.

The rejection of the notion that great powers should be granted spheres of influence is a cornerstone of Europe's security architecture. This principle is clearly articulated in the 1990 Charter of Paris for a New Europe, which stipulates that no State, nor any group of States, may designate any portion of the territory encompassed by the Organization for Security and Co-operation in Europe (OSCE) as falling within its sphere of influence. The Charter further affirms the sovereign right of each State to determine its own security arrangements and to choose its alliances freely.

The principle is backed by the provisions of the UN Charter which affirms the sovereign equality of all States and affirms every nation the right to determine its own security arrangements, provided it is done with respect for international law. Such decisions shall not be dictated by the proximity of major powers.

It was on this principle—and as a sovereign decision—that Sweden chose to join the North Atlantic Treaty Organization (NATO) in 2022.

Sovereign decision-making not only allows countries to define their own security and defense policies, it also gives them the freedom to decide independently which companies and nations they source their defense equipment from.

Rejecting spheres of influence is not just a European concern. It is as relevant for Europe as it is for the Americas. This was recently expressed by President Luiz Inácio Lula da Silva in a Guest Essay in *New York Times* (January 18, 2026) where he wrote that “The division of the world into zones of influence and neocolonial incursions for strategic resources are outdated and damaging.”

Sweden, together with the EU, has previously observed that Nicolás Maduro lacked legitimacy as a democratically elected president. This was also stated by many speakers at the meeting of the UN Security Council concerning Venezuela on January 5. But two wrongs don't make a right. The US operation against Nicolás Maduro in Venezuela was not in accordance with international law. Sweden stands up for international law, including all the principles of the UN Charter. All States have a responsibility to respect and act in accordance with international law, regardless of any other political or security considerations. Respect for international law is a security interest for Sweden, and we will always find it important to signal when States act in a way that is not in accordance with international law.

FROM MARGIN TO CENTER

But global power is not only shifting in the direction of those powers that support the idea of spheres of interest. The historic “North” or “West”—although these terms may be considered too vague and outdated—is outnumbered by the countries that were left in the margins or out altogether when the post-World War II structures of international cooperation were raised.

What is often referred to as “the Global South” is increasingly shaping the trajectory of the international order. Brazil stands out as one of its most influential actors. As the largest economy in Latin America and a leading voice among emerging powers, Brazil plays a pivotal role in global governance, climate negotiations, and trade. Its demographic weight, economic dynamism, and vast natural resources make it indispensable for addressing shared challenges. Brazil has returned to being an avid actor on the global scene, with important presidencies, among those of the UN Security Council (October 2023), G20 (2024), BRICS (2025) and COP 30 (since November 2025). Committed and active diplomacy has always been a hallmark of

Itamaraty's employees—but at the time of writing there is also the political will to be a forward-looking and dialogue-oriented actor.

For the European Union, engaging Brazil is not only about promoting common values but also about building a balanced and inclusive global system. This requires moving beyond rhetoric to concrete action: investing in Brazil's growth, supporting development initiatives, and ensuring meaningful participation in multilateral decision-making. A strong EU-Brazil partnership is essential for advancing a rules-based international order with genuine and mutual cooperation, fostering stability in an increasingly multipolar world.

SHARED BENEFITS, STRONGER TIES

The same logic underlies the cooperation between Brazil and Sweden. At times like these, trusted partners become more important than ever. With the Gripen deal, Sweden and Brazil have become strategic partners in a region where China and the US compete for influence.

Prior to the Gripen deal, defense ties between our countries were limited. Brazil's search for a next-generation fighter aircraft created an opportunity for Sweden to enter a sector previously dominated by the United States and France. The contract was unique as it centered on so much more than just a mere purchase of aircrafts, but included local assembly and co-production as well as long-term maintenance and training cooperation, something which necessitated extensive technology transfer. With an experienced and achieved partner like Embraer, this was not a difficult choice. The production contributes to Brazil's technological autonomy.

From a business perspective, both countries gained from this deal: it strengthened Sweden's reputation as a reliable, non-hegemonic defense partner and increased Swedish exports of high-value aerospace components. For Sweden—and Saab in particular—it gave a partner in testing and developing the Gripen, a foot into the South American market and a strategic distant production capacity.

At the same time, it confirmed Brazil's advanced aerospace industry and boosted Brazilian exports of parts and subassemblies for co-production. Brazil is positioned to be a potential exporter of Gripen components to third markets. On both sides, it expanded bilateral trade in services, including engineering and training.

But the impacts went beyond economic and industry dimensions, as it laid a foundation for bilateral political dialogue at ministerial and technical levels. These dialogues are still evolving. More than a decade after the deal was made, Brazil and Sweden held, in September 2025, their first ever dialogue on UN matters. This has

begun as a complement to multiple existing dialogues, such as the annual political consultations, the expert cooperations within the innovation partnership and the various military and defense dialogues.

CONCLUSION

What conclusions can be made by one single strategic deal such as Gripen ahead of the vast opportunities created by the now signed EU-Mercosur agreement?

The Gripen acquisition has transformed Sweden-Brazil relations, by deepening industrial cooperation, increasing political exchange and co-developing fundamental assets of security. On its own, the Gripen partnership shows what one strategic deal can achieve—deep trust, technology transfer, and a foundation for lasting dialogue. Gripen strengthened Sweden's position as a trusted partner and showcased the benefits of technology transfer and co-production. In short: it was a milestone for bilateral ties.

Today, with the EU-Mercosur Agreement, we stand before an opportunity of an entirely different magnitude. This is not just about aircrafts or tariffs; it is about shaping the future of cooperation between two continents.

The EU-Mercosur Agreement represents a systemic shift: it enables large-scale trade integration, investment flows, and institutional cooperation between entire regions—a game-changer for regional and global engagement.

At a time when global competition grows sharper and unilateralism threatens stability, we choose partnership. We choose rules-based trade. We choose to work with Brazil—a leading voice of the Global South—to build a fairer, more inclusive international order. ■

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European Union flag formed by binary code. Image: Shutterstock.

Defending EU Democracy and Sovereignty from the New Geopolitics of Technology

José Ignacio Torreblanca

Defending EU Democracy and Sovereignty from the New Geopolitics of Technology

José Ignacio Torreblanca

Abstract: This article argues that technology is a central dimension of international power, reshaping geopolitics through data, standards, platforms, and supply chains, while US–China rivalry drives securitization, selective decoupling, and technological spheres of influence, and private firms provide critical security infrastructures. As the US leverages the EU’s technological dependencies to pressure regulatory change and influence its domestic politics, the European Union faces an existential challenge. Regulatory leadership alone, the article concludes, is insufficient; capabilities to reduce dependencies, safeguard democracy, and strengthen technological sovereignty are also required.

Keywords: technological sovereignty; geopolitics of technology; artificial intelligence; democracy; European Union.

Defendendo a democracia e a soberania na União Europeia diante da nova geopolítica da tecnologia

Resumo: Este artigo argumenta que a tecnologia é uma dimensão central do poder internacional, reconfigurando a geopolítica por meio de dados, padrões, plataformas e cadeias de suprimento, enquanto a rivalidade entre Estados Unidos e China impulsiona a securitização, o desacoplamento seletivo e esferas de influência tecnológica, e empresas privadas fornecem infraestruturas críticas de segurança. À medida que os Estados Unidos exploram as dependências tecnológicas da União Europeia para pressionar mudanças regulatórias e influenciar sua política interna, a União Europeia enfrenta um desafio existencial. A liderança regulatória, conclui o artigo, é insuficiente; são também necessárias capacidades para reduzir dependências, salvaguardar a democracia e fortalecer a soberania tecnológica.

Palavras-chaves: soberania tecnológica; geopolítica da tecnologia; inteligência artificial; democracia; União Europeia.

THE RETURN OF HISTORY

Today, the great powers—fully aware that access to, control of, and mastery of critical technologies are indispensable requirements for their strategic survival—have entered an increasingly intense competition to secure their digital and technological sovereignty. This rivalry is not limited to the economic realm; it spans military, political, cultural, and normative dimensions. Technology has thus become a structural factor of power and international rivalry, on a par with territory, population, or natural resources. As technological dependencies become increasingly weaponized to coerce States into aligning with major powers' foreign policy objectives or to shape their domestic policy choices, the European Union—like other middle powers that neither lead nor fully control these emerging technologies—faces growing challenges to the resilience of its democratic institutions and the integrity of its technological sovereignty.

This phenomenon is not new. Throughout history, major technological revolutions have acted as precursors to major systemic changes, triggering profound economic, social, and political transformations both within societies and in the configuration of the international system and relations among its units. These changes have often unleashed significant conflicts, both within and among States.

Around 7,000 years ago, the shift from subsistence to intensive agriculture reorganized society. Surpluses allowed labor specialization and the emergence of durable political institutions: bureaucracies, taxation, standing armies, and religious hierarchies. Law and knowledge were codified, long-distance trade expanded, and authority concentrated in strategic centers, producing complex State structures and “hydraulic empires” built on control of water and agricultural resources, as well as the capacity to finance and arm large armies.

The first industrial revolution (1760-1840), driven by the steam engine, textile mechanization, and coal, shifted economies from agrarian to industrial foundations while eroding *Ancien Régime* structures and accelerating liberal economic and political change. Urbanization created new classes—the industrial bourgeoisie and the proletariat—whose demands transformed political representation. The American and French revolutions challenged Europe's monarchical order and unleashed conflicts that culminated in the Congress of Vienna (1814) and a new balance of power.

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The second industrial revolution (1860-1930), based on electricity, railways, telegraphy, and steamships, amplified States' power projection by reducing transport and communication costs and integrating markets. Western technological superiority enabled low-cost imperial expansion; nineteenth-century conquest, including in Africa, relied on steamships, machine guns, and quinine (Headrick 1979). Rivalries among empires helped set the stage for World War I and Europe's long decline.

In Asia, technological lag proved costly: Qing China's failure to adopt industrial technologies produced defeats and the "Century of Humiliation," shaping today's emphasis on technological security, while Japan's isolation ended abruptly in 1853 with Perry's "black ships."

The third industrial revolution (1970-2000), centered on Information and Communications Technology (ICT), digitization, automation, and financial liberalization, powered globalization of value chains and capital flows. As innovation diffused from the West, its exclusive predominance eroded and a more multipolar order emerged; China's rise revived debates about power transitions and the risk of conflict (Allison 2017).

Now, as the fourth industrial revolution, beginning around 2010 with advances in robotics, global connectivity, and artificial intelligence (AI), unfolds, these transformations are felt in an even more distinctive way. The center of gravity of corporate power has shifted from traditional sectors—such as energy or finance—toward the technology sector.

This shift has prompted growing State intervention in spheres previously regarded as predominantly private. Great powers now compete to control the strategic chokepoints of the digital economy: data, algorithms, connectivity infrastructure, and computing capacity. In this context, artificial intelligence has become a central field of geopolitical rivalry, especially between the United States and China, with direct implications for alliances, international norms, and balances of power. AI is not only transforming productive and labor relations within States;

For Europe, the new geopolitics of technology implies moving from the dependencies and vulnerabilities associated with oil and gas from the Middle East and Russia to being trapped in a new dependence on artificial intelligence models, data centers, semiconductors, and other technologies contested between the United States and China.

it is reconfiguring the architecture of global power by introducing new asymmetries and technological dependencies. As in previous technological revolutions, those who manage to master these capabilities will largely define the rules of the twenty-first century international order and the hierarchy of power within it.

The international consequences of this reconfiguration of the world around digital technologies are clear. Just as the economy based on the exploitation of fossil fuels generated an international order and a set of alliances linked to access to and control of production centers in the Middle East and the Persian Gulf, today's economy—based on the exploitation of data—is generating its own system of international relations, based on access to critical raw materials to feed that technological development and on supply chains and production and distribution centers and networks for digital technologies. For Europe, the new geopolitics of technology implies moving from the dependencies and vulnerabilities associated with oil and gas from the Middle East and Russia to being trapped in a new dependence on artificial intelligence models, data centers, semiconductors, and other technologies contested between the United States and China.

THE NEW GEOPOLITICS OF TECHNOLOGY

Three novel elements distinguish today's technological transformation from previous revolutions.

First, the speed, scope, and depth of current technological changes, especially regarding global connectivity and the diffusion of innovations. Whereas key twentieth-century technologies, such as the telephone, needed nearly half a century to reach one million users and a century to reach one hundred million, contemporary tools based on generative artificial intelligence, such as ChatGPT, reached one million users in five days and 100 million in five months (Hu 2023).

A second novel element concerns the transformation of the concept of security induced by technological development. Alongside the traditional domains of war—land, sea, air, and space—a fifth operational domain has emerged: cyberspace, which includes not only attacks on critical infrastructures—with growing potential due to increased connectivity of multiple devices, i.e., the Internet of Things—, but also the manipulation of the informational or cognitive space.

Authoritarian regimes, especially Russia and China, have found in the openness and lack of regulation of social media platforms in the West a very effective instrument to bolster their power, both inward and outward. As the director of Russia's State media, Margarita Simonyan, noted, Russia Today, Sputnik, and the

global network of Russian media exist for the same reason the Russian Ministry of Defence exists: “to wage an information war against the West” (Torreblanca 2020).

Disinformation phenomena demonstrate how manipulation of the information space can have strategic consequences comparable to those of traditional military instruments, and how certain actors can exploit these tools to their advantage.

A third distinctive element of today’s technological revolution is the central role of private technology companies as providers of services essential to national sovereignty. Today, a substantial portion of the critical infrastructures that sustain the functioning of advanced economies is in the hands of private companies, without the State having the technical, financial, or time capacity to replace them. This is the case for cloud computing services, advanced semiconductor manufacturing, the deployment and maintenance of submarine communications cables, or low-orbit satellite networks. These infrastructures are crucial both for economic activity and for military and intelligence capabilities, yet they far exceed the public sector’s capacities (Torreblanca 2023).

The conflict in Ukraine has highlighted this new reality. Western—particularly US—technology companies such as Microsoft, Amazon, Palantir or Starlink have played a key role in securing Ukraine’s critical digital infrastructures, providing key services to its Armed Forces (especially regarding data acquisition and processing). The growing fusion between the US Pentagon and certain software and digital services companies specialized in the military domain, such as Anduril or Palantir, paints an extremely worrying scenario. Just as Eisenhower warned in 1953 about the power of what he called the “military-industrial complex,” this concern about the structural power of private companies and their link to national sovereignty led President Biden to issue a similar warning in his farewell address about the “technological-industrial complex” and the consequences for democracy in the US and worldwide of the enormous concentration of power in the hands of a small number of technology companies (Biden 2025; Bria 2025).

Following President Trump’s inauguration in January 2025, major US tech companies have succeeded in getting the White House to adopt as its own their long-standing grievances and demands against legislation on digital services and markets, giving way to a frontal attack and a series of open coercive measures against the EU, the United Kingdom and, among others, Brazil.

All these transformations have profound implications for international security. Traditionally, technological evolution and military doctrine tended to advance in relatively synchronized fashion, granting States and their armed forces sufficient time to adapt their organizational structures, strategies, and defense industries. In

the current context, however, the pace of technological innovation far exceeds the cycles of planning, acquisition, and deployment of military capabilities, whose time horizons are necessarily longer. As a result, technological acceleration introduces high levels of strategic uncertainty, making it harder to anticipate threats and formulate stable doctrines (Frías 2024).

Henry Kissinger drew attention to this problem in one of his last works (Kissinger et al. 2021). The international order after the Second World War was stabilized by the existence of nuclear weapons, which not only established a clear and widely recognized hierarchy of power, but also enabled the development of a rational, explicit, and shared theory of deterrence, regardless of ideological differences among actors. Possession of nuclear weapons—measurable and verifiable—facilitated strategic predictability.

In the case of artificial intelligence, however, Kissinger warned that the attempt to turn this technology into a vector of military power faces a fundamental challenge: the difficulty of building an effective theory of deterrence based on a technology whose limits, capabilities, and effects remain largely uncertain. Unlike the nuclear weapon, whose use in the Second World War allowed the consolidation of a theory and practice of deterrence and even the establishment of limitation and non-proliferation agreements, artificial intelligence could prove strategically more effective as a covert capability, susceptible to being used unilaterally and unexpectedly to launch preventive attacks. This feature increases uncertainty and raises the risk of systemic instability.

If artificial intelligence constitutes, as Kissinger suggested, the contemporary equivalent of a new Manhattan Project, the central challenge lies not only in its technological development, but in the creation of a deterrence and international governance framework capable of stabilizing its use and avoiding dynamics of uncontrolled escalation. Without a theory of deterrence adapted to this new technological reality, the risk is not the absence of balance, but the generation of an international order that is structurally more unstable.

SECURITIZATION AND DECOUPLING

The dominant geopolitical impulse today is characterized by growing securitization of technology. States no longer conceive technological innovation primarily as a factor of economic efficiency or social welfare, but as a strategic resource of power. Consequently, each technological advance is evaluated according to two central criteria: the relative power it can confer on third parties and the degree of strategic vulnerability it can generate for the State itself (Torreblanca 2021).

This logic responds to a scenario in which States prioritize relative gains over absolute gains. Historical experience shows that when this logic prevails, States are willing to sacrifice their own economic growth if doing so helps to curb, contain, or slow the technological—and by extension military—development of their strategic rivals. In parallel, they seek to reduce levels of interdependence deemed excessive or dangerous through strategies of selective decoupling, especially in critical technological sectors.

This helps explain three closely linked contemporary dynamics: first, the restrictions imposed by the US on the export of advanced technologies to China; second, the acceleration of China's strategy of technological autonomy; and third, the European Union's insistence on achieving so-called technological sovereignty.

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The most immediate historical parallel is the 1980s, when the Reagan administration sought to prevent the Soviet Union from accessing dual-use digital technologies to slow its economic and military development. We are thus entering a new technological Cold War with its own characteristics, in which control, access, and the denial of markets, data, and critical technologies occupy a central place in political and strategic debate.

The geopolitical instrumentalization of technology and digital interconnectivity has generated growing disputes around multiple strategic domains: critical digital infrastructures (such as 5G networks and submarine cables), essential raw materials (including rare earths), key industries (artificial intelligence, cloud computing, semiconductors), control of data flows and storage, as well as the definition of technical standards that will shape the future development of emerging technologies.

In this context, numerous States have begun to raise digital borders by adopting data localization policies, export controls on sensitive technologies, and restrictions on the mobility of scientific talent (Ferracane et al. 2018). Simultaneously, they seek to build technological spheres of influence with politically like-minded countries, with the goal of expanding and consolidating both their structural power and their regulatory and technological models (CEIP 2019).

Historically, the technologies associated with major revolutions—agricultural, industrial, or information—tended to spread relatively widely once their initial development phase had been overcome (Ding 2024). No State managed to deny others sustained access to technologies such as the steamship, electricity, or more recently nuclear energy for civilian or even military use. Even contemporary attempts to limit nuclear proliferation of a military nature have had only partial success and only for limited periods of time. By contrast, the current moment is characterized by an unprecedented trend toward fragmentation of the international technological system into at least two large differentiated and mutually incompatible blocs: one led by the US and another headed by China.

The United States has been a pioneer in developing an integrated technological ecosystem capable of covering virtually all critical layers: from space and satellite infrastructures to submarine cables, digital platforms, cloud services, and advanced artificial intelligence capabilities. To achieve full technological autonomy, Washington still depends on some strategic bottlenecks, such as advanced lithography for semiconductor manufacturing—dominated by the Dutch company ASML—or the extraction and refining of rare earths, essential for the technology and defense industries, which China has dominated for decades.

China, for its part, has pursued a deliberate, long-term strategy aimed at technological self-sufficiency. Through early identification of critical sectors and massive State-coordinated investments—combined with a highly effective strategy of industrial espionage—Beijing has managed to position itself ahead of the US in certain strategic technologies and significantly reduce its external dependence. Although the manufacture of advanced semiconductors remains its main area of vulnerability, China is clearly on a path of technological convergence in this domain.

As a result, both the US and China can now offer their partners and allies comprehensive technological solutions that exclude, wholly or partially, the rival bloc. Analogous to the construction of a “great digital wall” in China’s internal market—by excluding the main US technology companies—Beijing has sought to expand its structural power by creating its own technological sphere of influence internationally.

These dynamics evoke the so-called “Great Game” of the nineteenth century between the British Empire and the Russian Empire, in which competition for spheres of influence combined strategic, economic, and technological interests. In the current context, technological alliances allow great powers to access new markets, raw materials, and data flows, while vying to impose their technical and normative standards globally (Hobbs et al. 2016; Walker 2022).

Consequently, although the technological revolution will continue advancing, its trajectory will no longer be guided exclusively by market logic, private economic actors, or multilateral institutions. On the contrary, governments have come to play a central role, steering technological development under criteria of national security, geopolitical competition, and strategic control, configuring an increasingly fragmented and competitive international system. From the aspiration of global interconnection, we have therefore moved to the reality of technological balkanization, decoupling, and the reduction of interdependencies and vulnerabilities (Leonard 2021).

TECHNOLOGY COERCION

The role of middle powers such as Brazil, the EU, India or Japan in an international system increasingly dominated by technological rivalries is profoundly problematic. By its very nature as a civil and normative power, the EU has historically tended to conceive of technology as an instrument of economic prosperity, social cohesion, and rights expansion, and not as a vector of geopolitical power. This approach has translated—especially over the last decade—into a strong bet on regulatory governance of technology centered on protecting fundamental rights, fair competition, and limiting abuses of power by private actors.

This strategy has earned the Union the label of “regulatory superpower,” fuelling the expectation that it could consolidate itself as a third normative technological pole, alternative to the US and Chinese models. In this vision, Europe aspires to become an attractive space for those States and societies that defend a rules-based international order, with relatively open access to technology—where technology would not be a source of strategic coercion or structural dependence, but a multiplier of development, inclusion, and individual autonomy (Hobbs & Torreblanca 2020).

Through the so-called “Brussels effect,” the EU has demonstrated a notable capacity to export its regulatory norms, especially in areas such as privacy and data protection. European regulations such as the General Data Protection Regulation (GDPR), which governs data privacy, came to be considered the “gold standard” of digital regulation worldwide. The size and attractiveness of the European market meant that even in the absence of major homegrown digital platforms, the leading US technology companies operated in Europe under significantly stricter standards than those prevailing in the US, where the absence of comprehensive federal privacy legislation has produced a much looser and more fragmented framework (Bradford 2020; 2023).

However, the implicit hypothesis that Europe could benefit from advanced digital services without developing equivalent industrial capabilities of its own has progressively eroded as geopolitical competition over technology between the US and China has intensified.

In a first phase, the United States successfully pressured the EU to decouple technologically from China, particularly in sectors such as 5G networks, depriving member States of relevant technological alternatives. In a second phase, Washington began to instrumentalize Europe's dependence on US technology to challenge European regulations and try to obtain exemptions or favorable reinterpretations for its companies. Finally, as Sino-American rivalry has sharpened, Washington has intensified pressure on Brussels to align its regulatory standards with US standards, characterizing European norms as extraterritorial, discriminatory, and even extortionate.

This dynamic has placed the EU in a position of structural vulnerability, lacking the material capacity needed to credibly evade coercion from either the US or China. The European strategy of developing indigenous technological alternatives in areas such as semiconductors, cloud, or artificial intelligence is a rational response, but extremely costly in time, financial resources, and political coordination. Consequently, this path cannot guarantee European technological sovereignty in the short term, forcing the EU to operate for a prolonged period under conditions of strategic dependence.

US pressure for Europe to reject Chinese technology began during the first Trump administration, but not only continued—it intensified—under the Biden administration, especially through the proliferation of export controls on critical technologies to China. According to the characterization of then National Security Advisor Jake Sullivan, the US would build a “small yard with high fences” in the technological domain (Biden 2023). However, the inclusion in these restrictions of the three most strategic technologies of the present—artificial intelligence, semiconductors, and quantum computing—made clear that this “yard” was far from small. On the contrary, it signalled the launch of a frontal challenge to China.

Another episode revealing Europe's vulnerability vis-à-vis the US occurred with the Dutch government's decision—directly in response to US pressure—to require ASML to cease exporting extreme ultraviolet lithography machines, indispensable for manufacturing advanced semiconductors. This case showed how even Europe's scarce critical technological advantages could be neutralized by external political decisions (Qin 2024).

Europe's dependence on private US technology companies became even more exposed during the war in Ukraine. In September 2022, Elon Musk ordered restrictions on Ukrainian access to the low-orbit satellite system Starlink, crucial for Ukrainian military communications (Roulette, Bryan-Low & Balmforth 2025). Musk justified his decision by claiming fear of nuclear escalation. This episode demonstrated the inherent risks of having technological capabilities essential to collective security controlled by private actors, capable of directly influencing strategic dynamics of the first order.

The Starlink case marked a turning point for the EU, revealing in tangible terms the consequences of having outsourced critical infrastructures to foreign private companies. Added to this were Musk's increasingly aggressive attacks on the EU during the US electoral cycle—also suffered by Brazil—, aligned with the positions of then President Donald Trump and the MAGA movement. These positions were reinforced by statements from then Senator J.D. Vance, who went so far as to question US commitment to Europe by alleging a supposed degradation of European democratic quality due to its digital regulations.

After his appointment as Vice President of the United States, Vance elevated this criticism to a central axis of US policy toward Europe in a controversial speech delivered at the Munich Security Conference in February 2025, in which he argued that the main threat to Europe did not come from Russia but from internal restrictions on freedom of expression (Vance 2025).

That same month, President Trump instructed his Secretaries of Commerce and the Treasury to respond to what he called European “regulatory extortions,” referring directly to digital services and digital markets legislation (White House 2025a). Thus, the alliance between the White House and major US tech companies was made explicit—already visible at Trump's inauguration ceremony, attended by leading Silicon Valley executives. Figures such as Mark Zuckerberg have equated European regulation with institutionalized censorship systems comparable—according to him—to those of China. Both Zuckerberg and Musk have openly challenged the Union, refusing to comply with certain obligations related to combating disinformation and online harms on platforms such as X.

Musk's direct interference in European political processes—such as his explicit support for anti-system forces like Alternative for Germany (AfD) during the German legislative elections in February 2025—has had a notable political impact. Not only for backing an extremist force, but for normalizing narratives that relativized Germany's historical past, which has been perceived as unprecedented interference by a foreign private actor.

A new source of alarm emerged with the Trump administration's decision to impose sanctions on the International Criminal Court after it issued arrest warrants against Israeli Prime Minister Benjamin Netanyahu: the US forced Microsoft to withdraw email services from the prosecutor responsible for the case. The company complied, showing that under US law companies must comply first and litigate later—even when this affects international institutions based in Europe (Satariano & Smialek 2025).

This episode highlighted unequivocally the systemic risk derived from Europe's dependence on US cloud computing services. Although it reinforced interest in developing European sovereign cloud infrastructures, it also confirmed that such alternatives would not be available in the short term, thus prolonging Europe's exposure to potential political coercion.

Finally, the publication of US national security doctrine in December 2025 confirmed Europe's worst fears by openly legitimizing the instrumentalization of US technological superiority for purposes of political transformation in Europe. The US strategy describes Europe as the victim of an anti-democratic ideological drift and defends the need to promote access to power for political forces aligned with Trumpism. The fear, from the European perspective, is that the US will replicate—through private digital platforms—influence tactics like those previously used by Russia, provoking a frontal transatlantic clash over digital services, regulatory sovereignty, and democracy (White House 2025b).

Taken together, these episodes reveal that the EU faces not only a deficit of technological capabilities, but an existential challenge in terms of sovereignty and democracy, in a context in which technology has ceased to be a neutral good and has become a central instrument of geopolitical coercion.

DEMOCRACY AND SOVEREIGNTY

The EU has explicitly recognized that technology constitutes a central dimension of its security and political autonomy (European Commission 2023). The European Commission that emerged from the June 2024 elections materializes this recognition by creating, for the first time, an Executive Vice Presidency dedicated to Technological Sovereignty—marking a turning point in Europe's conception of power in the twenty-first century.

Although the concept of technological sovereignty is not univocal—and is especially complex in a global context characterized by deep interdependencies and cross-cutting vulnerabilities—European institutions use it to refer to a concrete idea:

the Union's ability to make digital and technological decisions in accordance with its own interests and values, without being subject to external coercion deriving from critical dependencies.

From this perspective, guaranteeing European technological security requires acting simultaneously on four complementary planes: in-house capabilities, resilience against coercion, defense of the democratic space; and international alliances partnerships.

The first pillar—inevitable but long-term—consists of developing a European technological and industrial base (Eurostack) in those areas where external dependence generates economic or security risks. The mission letter sent by the President of the Commission, Ursula von der Leyen, to the head of the new portfolio clearly identifies these sectors: supercomputing, semiconductors, cloud computing, artificial intelligence, quantum computing, space technologies, the Internet of Things, and genomics (von der Leyen 2024).

Without its own capabilities in these areas, the EU lacks real room for manoeuvre. Technological security cannot rest exclusively on regulation if there is no material infrastructure that can provide credible alternatives. However, this strategy requires massive investments, coordination among member States, and explicit political acceptance that industrial policy is an unavoidable national security necessity.

Second, because development of these capabilities will take years, the EU needs instruments of protection and deterrence in the short- and medium-term against technological coercion by third parties, including its allies. Recent experience shows that Europe's dependence on US digital technologies and services can be used as a lever for political, regulatory, or even ideological pressure.

To mitigate this vulnerability, the Union should adopt a strategy that, first, uses trade policy strategically, recalling that the US maintains a structural surplus with the EU in digital services; second, strengthens competition policy by reducing the market power—and by extension the political power—of major technology platforms; third, advances common fiscal instruments, indispensable for financing strategic technological investments and avoiding regulatory capture; and fourth, explores national security tools, including European preference clauses or selective restrictions in sectors considered critical.

These instruments have already been applied with respect to China, to reduce dependence on companies from that country subject to legal frameworks that compel them to cooperate with intelligence services. Given that the US has comparable legislation with extraterritorial effects, the EU must also begin to assess the security

risk stemming from exposure to US companies, especially in areas such as cloud services, digital platforms, or data infrastructures.

A third element of European technological security is defending democratic processes against digital interference. The EU has made significant progress in this area through the Digital Services Act and the Digital Markets Act, as well as by adopting the so-called “democratic shield,” which explicitly recognizes electoral processes as critical infrastructures comparable to energy or transport infrastructures.

This approach is essential in a context in which digital platforms—whether US or Chinese—can be used as vehicles for disinformation, information manipulation, or indirect support for political forces hostile to democracy. Guaranteeing technological security therefore implies guaranteeing the integrity of public debate, even against private actors with systemic influence capacity.

Despite its vulnerability in other areas, the EU has shown that it should not give up its regulatory power. Effective enforcement of European digital legislation against major technology companies—including sanctions for non-compliance—constitutes one of the few instruments of structural power available to the EU. Conceding on this terrain would not reduce external pressure; it would increase it, by confirming that technological dependence can translate into political subordination. Regulatory firmness is not incompatible with transatlantic cooperation; it is in fact a condition for such cooperation to be based on more symmetrical relations (Torreblanca 2025).

Fourth. The EU is not the only democracy whose access to critical technologies may be constrained by US-China competition. As Brazil experiences, other middle and regional powers are also exposed to technological coercion and to foreign interference in democratic processes, often amplified by poorly regulated online platforms. These States therefore must cooperate in protecting democracy and sovereignty. These goals are best pursued through regional and global cooperation to uphold a rules-based, open, human-centered technological order. Initiatives such as the EU-Latin America and Caribbean Digital Alliance,

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and the AI regulatory coordination work of the OECD, the G7, and the G20, show the way ahead (Torreblanca et al. 2025).

In a world in which only two major technological poles exist—the US and China—the EU faces the risk of becoming a digital colony if it does not act decisively. Paradoxically, its vulnerability today is greater vis-à-vis the US than vis-à-vis China, precisely because of the depth of existing interdependence. Guaranteeing European technological security therefore requires a combination of ambitious industrial policy, instruments of defense against coercion, protection of the democratic space, and sustained political will. Technological sovereignty is not an end in itself; it is the necessary condition for preserving Europe’s political, economic, and social model in an increasingly competitive and coercive international environment.

CONCLUSION

Technology has become a central factor of international power, comparable to territory, population, or strategic resources. The current technological revolution—characterized by its speed, global reach, and the structural role of private actors—is accelerating the securitization of innovation and pushing the international system toward a logic of rivalry, fragmentation, and competition between technological blocs led by the United States and China.

In this context, the EU occupies an ambivalent position. Its strength as a regulatory power has enabled it to influence global digital governance, but the lack of its own industrial capabilities in critical technologies exposes it to dependencies that already translate into extreme vulnerability to external coercion.

Regulation alone is not sufficient to defend European sovereignty in an increasingly hostile geopolitical environment. Guaranteeing European technological security therefore requires an integrated strategy that combines long-term industrial policy, instruments of resilience and deterrence against technological coercion, and strengthened protection of the democratic space against digital interference.

Technological sovereignty is the necessary condition for preserving the EU’s decision-making capacity, democratic model, and strategic autonomy in the international order of the twenty-first century. 

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POLICY PAPER

O eixo Brasil-ASEAN: comércio, crescimento
e oportunidades estratégicas 175

Eugênia Barthelmess



Brazil and ASEAN flags side
by side. Image: Shutterstock.

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Resumo: Os centros de gravidade do poder mundial deslocam-se com rapidez inesperada. Hegemonias percebidas como imutáveis cedem lugar a novos polos de produção e de consumo. Em 2025, o relativo declínio das capacidades de renovação dos Estados Unidos e da Europa coincide com o regresso à Ásia do motor econômico do mundo. A ASEAN se destaca nessa nova realidade como ambiciosa plataforma de inovação e importante mercado de consumo. Em cenário de transformações geoeconômicas, caracterizado pela imprevisibilidade da atuação política e comercial das hegemonias tradicionais, o Brasil tem muito a ganhar ao investir em uma aproximação crescente com o Sudeste da Ásia.

Palavras-chave: Brasil; ASEAN; oportunidades estratégicas.

The Brazil-ASEAN Axis: Trade, Growth and Strategic Opportunities

Abstract: The centers of global power are shifting at an unexpected pace. Hegemonies perceived as immutable are giving way to new poles of production and consumption. By 2025, the relative decline in the renewal capacities of the United States and Europe coincides with the return of the world's economic engine to Asia. ASEAN stands out in this new reality as an ambitious innovation platform and an important consumer market. In a scenario of geoeconomic transformations, marked by the unpredictability of the political and commercial actions of traditional hegemonies, Brazil has much to gain by investing in deepening its rapprochement with Southeast Asia.

Keywords: Brazil; ASEAN; strategic opportunities.

Because without the United States, everything in the world would die.

It's true. It's so powerful. It's so big.

– Donald Trump, entrevista à imprensa na Casa Branca, 3 de setembro de 2025

Instead of inquiring why the Roman empire was destroyed,
we should rather be surprised that it had subsisted so long.

– Edward Gibbon, *History of the Decline and Fall of the Roman Empire*, Volume VI

Le monde a changé, il doit changer encore.

– Maximilien de Robespierre, *Discours du 18 Floréal, An II*

“A verdade é que só havia grandes potências na Europa; e hoje elas são as primeiras a reconhecer que há no Novo Mundo uma grande e poderosa nação com que devem contar e que necessariamente há de ter a sua parte de influência na política internacional do mundo inteiro” (Lins 1995, 318). Assim se dirigia o Barão do Rio Branco, em 1905, em despacho à recém-inaugurada embaixada do Brasil em Washington. A guerra civil que opôs o Norte industrializado ao Sul rural e escravocrata havia então terminado há já 40 anos, e os Estados Unidos apareciam no cenário internacional como potência econômica crescentemente imperial, amparada no aço, no petróleo, em ferrovias, manufaturas, urbanização e rápida transformação social. A Rio Branco “não escapou a visão desse fenômeno, que era o do poder internacional a dividir-se, nos fins do século XIX, entre a Europa e os Estados Unidos” (Lins 1995, 317), relembra Álvaro Lins em sua clássica biografia do chanceler brasileiro.

Nem todos os formuladores de política externa tiveram àquela altura a mesma clarividência. A legação argentina na capital norte-americana, que operava, como a legação brasileira, desde 1824, seria elevada à categoria de embaixada apenas em 1914. Sem descuidar de sua relação com a Europa, no início do século XX o Brasil deliberou apresentar-se como o principal interlocutor sul-americano junto aos EUA, buscando dessa forma consolidar uma posição de visibilidade regional e

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ampliar sua projeção internacional. Já a Argentina optou por continuar a privilegiar sua inserção em um sistema europeu ancorado sobretudo no Reino Unido, no qual insistia em perceber o eixo central do arcabouço internacional como um todo. Pode-se argumentar que esse contraste tenha sido decisivo para moldar as subsequentes orientações geopolíticas dos dois países e tido efeitos de longo prazo sobre seus respectivos processos de desenvolvimento econômico.

A aposta argentina em priorizar o vínculo tradicional com a Europa, para onde exportava seu produto agrícola e de cujo capital e mercados dependia, continuaria a render frutos ainda por um par de décadas, certamente até os anos 1930. Em meados dos anos 1940, porém, a economia brasileira, ao investir no desenvolvimento da sua base industrial¹ no interior de um arcabouço econômico centrado nos EUA, suplantou pela primeira vez a economia argentina, fragilizada pelo desastre das duas grandes guerras europeias. Desde então, o país vizinho já não lograria superar seu relativo declínio econômico em relação ao Brasil, que se consolidaria como a maior economia da América Latina e, desde meados dos anos 1970, como uma das maiores do mundo.

Os deslocamentos do centro de gravidade do sistema mundial acontecem, no entanto, com surpreendente rapidez.

Neste final de 2025, estamos muito longe de 1991, quando a dissolução espontânea da União Soviética inspirou a miragem de um fim da História² que asseguraria a preeminência, a perder de vista, da perspectiva de Washington sobre os rumos do cenário internacional. De forma paradoxal, foi a partir daquele momento de aparente triunfo que se imprimiu a normalização de práticas que, ao longo das décadas seguintes, gerariam graves limitações concretas para a economia dos vencedores da Guerra Fria. Políti-

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1. Data de 1941 a criação do Conselho Nacional de Industrialização, órgão estatal de planejamento do desenvolvimento industrial brasileiro. Do mesmo ano é a fundação da Companhia Siderúrgica Nacional (CSN), em Volta Redonda (RJ), que passou a contar com financiamento e apoio técnico dos Estados Unidos, nos termos dos chamados Acordos de Washington (1942). A CSN foi essencial para a produção brasileira de aço, base para o desenvolvimento nacional da indústria pesada.

2. O cientista político norte-americano Francis Fukuyama (1992) sustentava, em *The End of History and the Last Man*, que a democracia dita liberal, associada ao capitalismo de mercado, estabeleceria-se definitivamente como modelo global dominante em um mundo que superara a Guerra Fria.

cas de desregulamentação, desindustrialização, privatização generalizada, redução de impostos sobre o capital e foco no capitalismo financeiro em detrimento da economia real contribuiriam para a concentração da renda, o abandono dos investimentos em infraestrutura física e o importante e inegável empobrecimento relativo da classe média³ nos Estados Unidos.

Estamos hoje muito longe de 2001, quando, ao juntar-se à Organização Mundial do Comércio, a China embarcou em um processo relâmpago de integração à economia global – da qual passou a ser o fator-chave – e de conformação, ao mesmo tempo, de um gigantesco mercado consumidor doméstico de classe média. As consequências, para a própria China, o Sudeste da Ásia, o chamado Sul Global e o mundo, seriam profundamente transformadoras.

A participação dos Estados Unidos no comércio global de bens, que atingira seu ápice no pós-guerra dos anos 1940 com cerca de um terço do total e que nos anos 1970 representava ainda cerca de 25%, passou a declinar significativamente já a partir da década de 1980, com a ascensão internacional das economias do Japão e da Alemanha Ocidental. Apesar do sucesso da estratégia norte-americana de contenção da competitividade alemã e japonesa⁴, os EUA continuaram a perder terreno, em um gradual mas contínuo desengajamento da economia global. Seu grau de abertura comercial, medida como importações e exportações em relação ao PIB, não tem acompanhado a tendência global. O ritmo inédito da incorporação da China às cadeias globais de valor e a crise financeira

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3. Em *Le Capital au XXI^e siècle*, o economista francês Thomas Piketty (2013) discute o empobrecimento relativo da classe média americana, em um contexto de crescente desigualdade de rendimentos. Na terceira parte da obra ("La structure des inégalités"), o autor coteja os rendimentos do trabalho e os retornos do capital, diagnosticando tendência em favor da captura, por uma minoria cada vez mais reduzida, dos benefícios do crescimento econômico do país.

4. O chamado Plaza Accord, firmado em 1985 por EUA, Japão, Alemanha Ocidental, França e Reino Unido no Hotel Plaza, em Nova York, promoveu a desvalorização coordenada do dólar frente ao iene e ao marco, com o objetivo, bem-sucedido, de provocar o declínio da competitividade exportadora japonesa e alemã. No mesmo ano, sanções dos EUA à Toshiba enfraqueceram consideravelmente a empresa, emblema da industrialização e internacionalização da economia do Japão, sinalizando a retração da participação japonesa no comércio global de bens. É limitada a autonomia estratégica de Japão e Alemanha, onde tropas norte-americanas permanecem estacionadas desde o final da Segunda Guerra. Não se pode dizer o mesmo da China, principal parceiro comercial da maioria dos países, impermeável a estratégias desse gênero.

de 2008 aceleraram essa retração⁵. Na realidade atual de um comércio mundial de bens que é estimado em US\$ 50 trilhões para 2025, os EUA exportam US\$ 2,12 trilhões e importam US\$ 3,15 trilhões. A China exporta US\$ 3,63 trilhões e importa US\$ 2,63 trilhões. Os Estados Unidos passaram a responder, portanto, por 10,6% do comércio global de bens, enquanto a China lidera com 12,5% (World Trade Organization 2025; UNCTAD 2025)⁶.

Em termos de capacidade industrial, a China superou o Japão em 2005, os EUA em 2008 e a União Europeia em 2011. Dados recentes do Banco Mundial sugerem que a capacidade industrial da China se aproxima da capacidade combinada de Estados Unidos, União Europeia e Japão⁷. Essa tendência não mostra sinais de reversão a curto ou médio prazo. As ressalvas habituais sustentam que, embora o volume da produção manufatureira chinesa seja inigualável, os EUA e a Europa ainda estariam à frente em inovação de alto valor. Na prática, o incremento das exportações chinesas de bens de alta tecnologia (veículos elétricos, robôs industriais) e os progressos recentes alcançados pela China na indústria de semicondutores demonstram liderança em inovação tecnológica. As sanções às exportações para a China de tecnologias críticas ligadas à produção de *chips* tiveram o efeito de acelerar o desenvolvimento doméstico chinês (Huawei, SMIC) nessa esfera, sinalizando crescente autonomia em relação a insumos ocidentais. Maior mercado consumidor de tecnologia do mundo, a China é, ao mesmo tempo, fonte crítica de insumos e matérias-primas, dominando inúmeras cadeias globais de suprimento, desde terras-raras e baterias de íons de lítio até painéis solares e componentes óticos de alta precisão.

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5. Resultado da exacerbação das políticas de favorecimento da economia financeira em detrimento da economia real, a crise de 2008 gerou recessão, desemprego, queda no consumo e consequente redução nas importações americanas. A queda na produção, no crédito e nos investimentos provocou, por sua vez, efeito negativo sobre o dinamismo exportador dos EUA.

6. No âmbito do comércio mundial de serviços, que é da ordem de US\$ 14 a 15 trilhões (OMC e FMI, dados de 2024), os EUA ainda lideram, com cerca de 17% do comércio global, enquanto a China responde por cerca de 8%. A China faz avanços rápidos em serviços, sobretudo em serviços digitais, engenharia e logística, e investe crescentemente em inteligência artificial, *fintech* e computação em nuvem.

7. A produção industrial é geralmente medida pelo chamado valor adicionado de manufatura (MVA), que captura o valor líquido dos bens produzidos. Os filtros por país e por ano dos World Development Indicators do Banco Mundial mostram a China com um MVA de aproximadamente US\$ 4,66 trilhões, contra US\$ 2,91 trilhões dos EUA, cerca de US\$ 2,5 a 3,0 trilhões da UE e cerca de US\$ 0,87 trilhões do Japão (World Bank. World Development Indicators, 2025).

Os Estados Unidos têm perdido terreno em inovação, em parte devido à redução do financiamento federal em pesquisa e desenvolvimento (P&D) – que teria caído de cerca de 67% de todo a P&D domésticos em 1964 para menos de 20% em 2023, segundo a *National Science Foundation* (2025). A participação norte-americana na produção científica e em áreas de engenharia vem diminuindo gradualmente, em paralelo à ascensão chinesa nesse domínio. De acordo com a Organização Mundial da Propriedade Intelectual (WIPO), a China lidera desde 2011 o número anual de patentes concedidas (WIPO 2024). Em 2023, detinha cerca de cinco milhões de patentes em vigor, frente a aproximadamente 3,5 milhões dos EUA (WIPO 2024). Embora esse indicador não seja sinônimo, por si só, de vanguarda tecnológica, a China consolidou-se como campeã global em inovação aplicada – impulsionada por sua escala de mercado, capacidade de execução industrial, velocidade de difusão tecnológica, liderança setorial, rápido ciclo de aprendizado e crescente poder de definição de padrões – ultrapassando em vários segmentos-chave as economias ocidentais.

O relatório de outubro de 2025 do *World Economic Outlook* do Fundo Monetário Internacional (FMI) indica que, no que diz respeito ao peso econômico global em paridade de poder de compra (PPC), os Estados Unidos representam hoje não mais do que 15,5% do PIB global, com tendência de retração; a União Europeia, 16,5%, com tendência de retração; e a China, aproximadamente 19%, com tendência de expansão (IMF 2025).

China	19 %
União Europeia	16,5 %
Estados Unidos	15,5 %
Índia	7,1%
ASEAN	3,7 %
Japão	3,7 %
Brasil	2,2 %
Coreia do Sul	1,7 %
Canadá	1,5%

Tabela 1 – Participação no PIB global em PPC/2025. Fonte: WEO (2025).

A mesma fonte indica que o peso do Sul Global – que entenderemos aqui como as Economias de Mercado Emergentes e em Desenvolvimento (EMDEs) – somado ao peso da China representa 60,64% do PIB global em PPC para 2025. Subtraindo-se do Sul Global a fatia que corresponde à China, chega-se a 41,64% do total, ou seja, ainda assim uma proporção maior do que a presença somada de EUA e União Europeia (32%). Se considerarmos a presença conjunta de Estados Unidos e UE, mais Canadá, Japão e Coreia do Sul (grupo a que poderíamos nos referir, grosso modo, como o Norte Global), o total em PIB/PPC alcançaria 38,9%, ou seja, ainda assim inferior ao peso conjunto do Sul Global sem a China.

EUA + UE	32 %
EUA + UE + Japão + Coreia do Sul + Canadá	38,9 %
Sul Global sem China	41,6 %
Sul Global com China	60,6 %

Tabela 2 – Norte x Sul: participação no PIB global em PPC/2025. Fonte: WEO (2025).

Os dados do FMI demonstram que estamos diante de uma inversão histórica do motor do poder econômico e revelam uma mudança estrutural profunda. O Sul Global *sem* a China já supera o Norte Global em PIB/PPC, ultrapassando o peso daquelas economias a que o FMI ainda se refere, com ironia involuntária, como *advanced economies*.

Decorridos 120 anos, os EUA, potência ascendente em 1905, experimentam hoje um indiscutível declínio relativo em sua participação no comércio global, na produção industrial, na produção científica e tecnológica e no PIB mundial. Seu monopólio do poderio militar tampouco já é certo. O desfile militar chinês de 3 de setembro de 2025, que marcou o 80º aniversário da vitória sobre o Japão na Segunda Guerra, foi considerado por observadores especializados⁸ como marco crítico de domínio, pela China, de tecnologias que rivalizam ou superam as norte-americanas⁹. Os Estados Unidos, aquele ator até outro dia incontornável, consomem

8. A edição anual de 2025 do *Index of US Military Strength*, publicado em meados do ano pela Heritage Foundation, *think tank* norte-americano conservador especializado em defesa e segurança, classifica o poderio militar dos EUA, pela segunda vez consecutiva, como “fraco” em contraste com os avanços chineses nessa área. Análises complementares da Heritage Foundation, divulgadas após o desfile, referem-se a este como evidência da “modernização acelerada” do Exército de Libertação Popular (PLA). The Heritage Foundation (2025).

9. Como mísseis hipersônicos e a chamada tríade nuclear completa – bombardeiros nucleares, mísseis balísticos intercontinentais (ICBMs) e mísseis balísticos lançados de submarinos (SLBMs) – todos exibidos no desfile.

hoje cerca de apenas 13% das exportações chinesas (UNCTAD 2025) e não chegam a absorver 12% das exportações brasileiras (MDIC 2024).

O mundo mudou. O século XX, o chamado século americano, acabou há um quarto de século. Já não estamos em um momento de transição, mas de pós-transição. A re-emergência da China como potência estabeleceu uma nova dinâmica comercial em uma realidade econômica global transformada.

Como em 1905, os sinais estão mais do que dados. Fontes conservadoras abalizadas, como aquelas citadas aqui, comprovam ter tido lugar uma reconfiguração sistêmica, um deslocamento do centro de gravidade do poder econômico global. O notável é que seja necessário afirmar o que é evidente, e que, ao fazê-lo, isso possa gerar incredulidade ou despertar suscetibilidades. No discurso convencional da *intelligentsia* acadêmica e dos formadores de opinião ocidentais, continuam hoje a ser recitados, como ao longo dos últimos 30 ou 40 anos, os dogmas da excepcionalidade norte-americana e centralidade europeia e do desejado colapso – sempre apresentado como iminente – da capacidade chinesa de crescimento sustentado.

Em suas memórias sobre a aproximação sino-americana de 1972, Henry Kissinger escreveu que a China da última dinastia imperial (1644-1912) entrara na era moderna dominada por uma elite política “oblivious to the onset of the Western age of exploration” e “unaware of the technological and historical currents that would soon threaten its existence”. Não faltaram à época, segundo o Secretário de Estado de Richard Nixon¹⁰, correntes que sustentavam ser necessário fazer face ao avanço europeu por meio de fortalecimento de capacidades internas e adaptação tecnológica. Apoiada por uma população conservadora, a facção prevalecente deliberou, contudo, que se adaptar equivaleria a abandonar a essência da herança chinesa, percebida como invencível. “Centuries of predominance”, conclui ele, “had warped the Celestial Court’s sense of reality” (Kissinger 2011, 49-63).

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Seja por condicionamento ideológico, seja por inércia cognitiva – como nas vésperas da capitulação ao invasor britânico dos cortesãos da dinastia Qing, como a elite argentina nos anos 1910 –, as análises ocidentais ainda predominantes tendem a privilegiar o dogma sobre a evidência dos fatos, aferrando-se a um passado que já se foi.

10. E de Gerald Ford.

A ascensão econômica da China transformou o jogo de forças do comércio mundial. Um dos efeitos dessa transformação tem sido o aumento do comércio entre os atores do Sul Global. Ao importar grandes volumes de matérias-primas e exportar bens manufaturados acessíveis, a expansão chinesa não apenas elevou o comércio bilateral entre o seu próprio mercado e o de outros mercados em desenvolvimento, mas também fomentou novos investimentos e acordos comerciais que ampliaram o fluxo de bens e serviços intra-Sul. Essa ascensão promoveu a integração de economias do Sul a grandes cadeias de suprimento, em redes intra e extrar-regionais, e em trocas comerciais cada vez mais resilientes e diversificadas. Por meio de realinhamentos comerciais e diversificação de parcerias, produziu uma crescente autonomia econômico-comercial do Sul em relação aos Estados Unidos e à União Europeia. Projeções do FMI sugerem a continuidade dessa tendência à medida que o PIB do Sul continua a crescer mais rapidamente do que o do Norte¹¹.

O Brasil, que já é ator relevante nesse novo contexto, conta com as condições para continuar a se adaptar ao ritmo dos ciclos tecnológicos e geopolíticos, os quais parecem cada vez mais curtos, rejeitando leituras anacrônicas e reunindo as ferramentas para tomar o melhor partido da realidade e posicionar-se de forma cada vez mais competitiva frente a essa nova configuração.

ASCENSÃO DA ASEAN

O eixo econômico-comercial do mundo deslocou-se para a Ásia. Regressou à Ásia, melhor dizendo, após um período de cerca de 250 anos em que esteve excepcionalmente ancorado no Atlântico Norte. É na Ásia emergente – China, Índia e Sudeste Asiático, estendendo-se muito além dos tributários dos EUA que são o Japão e a Coreia do Sul – que se encontra hoje a principal fonte do crescimento da economia global, tanto na vertente da produção, quanto, com seus imensos mercados, na do consumo.

Sabe-se que a China é o principal parceiro comercial de cerca de dois terços dos Estados-membros das Nações

Sabe-se que a China é o principal parceiro comercial de cerca de dois terços dos Estados-membros das Nações Unidas [...]. Mas poucas vezes se pergunta quem é o principal parceiro comercial da China [a ASEAN].

11. Na avaliação do World Economic Outlook do FMI, o Sul cresce cerca de 2,5-2,7 pontos percentuais mais rapidamente do que o Norte em 2025-2026, devendo essa diferença manter-se estável a médio prazo. As mesmas projeções indicam que, sem grandes choques, o PIB do Sul (em PPC) atingirá cerca de 65% do total global até 2030 (IMF 2025).

Unidas; tem sido desde 2009, há 16 anos, o país com o qual o Brasil, por exemplo, mantém o maior volume total de comércio, ano após ano. Mas poucas vezes se pergunta quem é o principal parceiro comercial da China.

Há cinco anos consecutivos, desde 2021, o principal parceiro comercial da China é a Associação das Nações do Sudeste Asiático (ASEAN) – seguida pela União Europeia e os Estados Unidos, a Coreia do Sul e o Japão. Em 2024, foram os seguintes os volumes das respectivas correntes de comércio (US Census Bureau & BEA 2025):

China-ASEAN	US\$ 982,34 bilhões
China-União Europeia	US\$ 848,23 bilhões
China-EUA	US\$ 688,34 bilhões
China-Coreia do Sul	US\$ 328,15 bilhões
China-Japão	US\$ 308,3 bilhões

Tabela 3 – Dados do US Census Bureau e do Secretariado da ASEAN. US Census Bureau and Bureau of Economic Analysis, "US International Trade in Goods and Services, December and Annual 2024".

O principal parceiro da ASEAN, por sua vez, é, pelo 16º ano consecutivo, a própria China, em uma integração profunda que envolve, além do comércio, investimentos diretos chineses e integração em cadeias globais de suprimentos. A proximidade da relação deriva da facilitação dos fluxos de bens, serviços, insumos e investimentos promovida pelo Acordo de Livre Comércio ASEAN-China, de 2005, e pela Parceria Econômica Regional Abrangente (RCEP), de 2022, que será examinada adiante.

O volume atual de comércio entre a ASEAN e a China, de mais de US\$ 982 bilhões, representa cerca de 16% do comércio total da China (MOFCOM 2025) e cerca de 20% do comércio total da ASEAN (2024a). A proporção das correntes de comércio (bens) entre a ASEAN e seus principais parceiros, excluído o comércio intra-ASEAN, é aproximadamente a seguinte (ASEAN 2024b, 2024c):

ASEAN-China	21,8%
ASEAN-EUA	13,1%
ASEAN-UE	8,4%
ASEAN-Japão	7%
ASEAN-Outros	49%

Tabela 4 – Proporção de parcerias comerciais ASEAN. Fonte: ASEAN Merchandise Trade Statistics 2024.

Criada em 1967, a ASEAN é, desde 1992, uma área de livre comércio que reúne Brunei, Camboja, Filipinas, Indonésia, Laos, Malásia, Mianmar, Singapura, Tailândia, Timor Leste e Vietnã. Algumas dessas economias (Indonésia, Malásia, Tailândia, Filipinas e Vietnã) têm peso populacional e econômico considerável. Outras, como Laos ou Camboja, vêm apresentando sinais de crescente dinamismo. Juntos, esses onze países estão entre os que mais crescem no mundo. O PIB da ASEAN praticamente duplicou no decorrer dos últimos dez anos e poderá voltar a duplicar ao longo da próxima década. Organizado na forma da Associação, o Sudeste da Ásia é das regiões que mais diretamente se beneficiaram do deslocamento para o Oriente do centro global de economia e comércio.

A ASEAN é o resultado do êxito notável na construção de uma estrutura de integração regional em meio à mais extrema diversidade. Embora geograficamente próximos, seus integrantes (a que o Timor Leste veio somar-se como membro pleno em 26 de outubro de 2025) são países de língua, religião, cultura e etnia extremamente diversas entre si. A ASEAN abarca centenas de idiomas¹² e múltiplas religiões e etnias. As disparidades econômicas, como as que opõem Mianmar (PIB nominal *per capita* de pouco mais de US\$ 1 mil) a Singapura (PIB nominal *per capita* de US\$ 92 mil), ou de densidade populacional, como entre o Timor Leste (menos de 2 milhões de habitantes) e a Indonésia (280 milhões de habitantes), não têm impedido a fluidez da concertação política e da integração comercial.

A área de livre comércio (ALC) instituída em 1992 valeu-se de uma tarifa preferencial comum, adotada por meio de cronogramas de desgravação, para fomentar a integração econômica intrarregional e o incremento das vantagens competitivas da região como base de produção para o mercado global. A ALC evoluiu para uma visão mais ampla e ambiciosa de integração, levando, em 2015, à conformação da Comunidade Econômica da ASEAN (AEC), que estabeleceu um mercado único com livre fluxo não apenas de bens, mas de serviços e investimentos, capital e mão de obra qualificada¹³, com o objetivo de criar uma plataforma de produção e consumo efetivamente integrada. O plano estratégico da ASEAN para o quinquênio 2026-2030, conhecido como Blueprint pós-2025, é uma nova evolução natural das ambições da AEC, com foco em digitalização, economia verde, resiliência a choques globais e mitigação de disparidades de desenvolvimento entre os Estados-membros.

12. Além das línguas oficiais, que podem ser três ou quatro por país, mais de mil outros idiomas são falados pelas diferentes etnias dos Estados-partes. Apenas na Indonésia, com suas 17 mil ilhas, falam-se cerca de 700 idiomas.

13. O livre fluxo de mão de obra é restrito a profissionais qualificados em setores específicos, o que é regulamentado por meio de acordos de reconhecimento mútuo que privilegiam a mobilidade de profissionais em oito áreas prioritárias: medicina, odontologia, enfermagem, engenharia, arquitetura, topografia, contabilidade e turismo.

PERSPECTIVAS DE CRESCIMENTO

Em um contexto de aceleração da globalização econômico-comercial e de rápido enriquecimento da Ásia a partir dos anos 1980 e 1990, a ASEAN soube capitalizar o milagre asiático para se integrar às cadeias de valor globais. O PIB regional passou de algo como US\$ 500 bilhões em 1990 para mais de US\$ 4 trilhões em 2025, posicionando a Associação como a quinta maior economia mundial, no mesmo patamar da Índia¹⁴.

O que era, há menos de 40 anos, um conjunto de economias pobres dependentes da exportação de commodities e manufaturas rudimentares passou a ser uma potência econômica diversificada e altamente integrada, reconhecida como um dos principais *hubs* globais de manufatura, tecnologia e serviços. A integração regional bem-sucedida e a ênfase no desenvolvimento industrial e na atração de investimento estrangeiro direto foram os pilares dessa trajetória.

A ASEAN emerge hoje como plataforma de indústria 4.0, com forte posicionamento em indústrias avançadas amparado por políticas regionais sistemáticas e deliberadas. Iniciativas adotadas de comum acordo promovem projetos conjuntos em semicondutores, veículos elétricos e biotecnologia, alavancados por investimentos da China e do Japão. O setor manufatureiro representa algo como 30% do PIB regional, crescendo cerca de 6% ao ano, com ênfase em eletrônicos (Malásia, Vietnã) e automotivos (Indonésia, Tailândia).

A ASEAN emerge hoje como plataforma de indústria 4.0, com forte posicionamento em indústrias avançadas amparado por políticas regionais sistemáticas e deliberadas.

As projeções de crescimento econômico na ASEAN até 2030 variam por país, mas o consenso é de expansão sustentada. A Indonésia, maior economia do bloco, deve crescer a 5,1% ao ano, elevando seu PIB de US\$ 1,4 trilhão em 2025 para US\$ 2,5 trilhões em 2030, beneficiada por recursos naturais e manufatura. As Filipinas e o Vietnã, com taxas acima de 6%, alcançarão US\$ 800 bilhões e US\$ 700 bilhões, respectivamente, impulsionados por exportações e investimento estrangeiro. A Tailândia e a Malásia projetam 4% a 5%, com foco em turismo e eletrônicos, enquanto Singapura, com 3% a 4%, mantém liderança em serviços

14. O Secretariado da ASEAN estima em seus Statistical Highlights, atualizados em 2024, que o PIB nominal atual da Associação estaria entre US\$ 3,98 e 4,0 trilhões (Fonte: ASEAN Secretariat 2024c).

financeiros¹⁵. Países como Laos e Mianmar, embora mais voláteis, beneficiam-se da integração regional por meio do Acordo de Parceria Econômica Abrangente Regional (RCEP), que discutirei abaixo e que poderá, segundo se avalia, adicionar US\$ 1,2 trilhão ao comércio intra-asiático até 2030.

As taxas de crescimento do PIB regional devem atingir 4,8% em 2025, o que é superior à média global de 3,2%, impulsionadas por exportações (cerca de 40% do PIB da ASEAN) e por turismo (de 5 a 10%). O PIB per capita cresceu 4,5% nos últimos dez anos, de US\$ 3.500 em 2015 para US\$ 6.010 em 2025, reduzindo a pobreza de 16% para 6% a 7%, malgrado a persistência das disparidades entre os Estados-membros.

Para manter um ritmo sustentado do crescimento da capacidade de produção que continue a atender à demanda interna e à sua vocação de exportação, a ASEAN conta com diferentes fatores estruturais positivos. Com mais de 690 milhões de habitantes em 2025 – superando em quase três vezes a população do Brasil (212 milhões) – a Associação detém uma força de trabalho jovem, com taxa de dependência demográfica em declínio até 2030, contrastando com a tendência ao envelhecimento das economias ocidentais.

A urbanização deverá continuar a ser elemento fundamental das dinâmicas de crescimento do Sudeste asiático. Entre 2020 e o final de 2025, avalia-se que 70 milhões de pessoas terão migrado para cidades, elevando a taxa de urbanização de 50% para 60% até 2030. Segundo o Banco Asiático de Desenvolvimento (ADB), essa tendência deverá continuar a demandar investimentos de trilhões de dólares adicionais em infraestrutura, impulsionando setores como construção e serviços e elevando a produtividade laboral.

Uma classe média emergente poderá atuar como catalisador-chave nesse processo. Estima-se que, de 91 milhões em 2010, o segmento de classe média da população da ASEAN passe a 334 milhões em 2030 (51% da população). O FMI avalia que a renda disponível desse setor poderá crescer 56% no chamado ASEAN-5

O Sudeste da Ásia parece estar preparado para contornar os próprios gargalos internos e navegar os diferentes riscos globais, a exemplo das novas tarifas comerciais norte-americanas, mantendo-se como um dos pilares da economia mundial.

15. Utilizei aqui o Asian Development Outlook, publicado pelo Asian Development Bank (ADB), que fornece projeções detalhadas de crescimento do PIB por país estendidas, em alguns cenários, até 2030 (ADB 2024, p. 45-67 [para projeções por país] e p. 120 [para impacto do RCEP]).

emergente (Indonésia, Malásia, Filipinas, Tailândia e Vietnã). Aliada à penetração digital (92% em áreas urbanas da Indonésia até 2030), essa expansão deverá impulsionar o consumo interno, que já representaria 60% do PIB regional¹⁶. O comércio eletrônico e serviços de *fintech* poderão adicionar US\$ 1 trilhão ao PIB até 2030, fomentando uma demanda sustentada por bens de consumo, educação e saúde.

Mais do que um bloco em crescimento, a ASEAN apresenta-se, em síntese, como um ecossistema resiliente, em que coordenação intrarregional afiada, urbanização, demografia favorável e ascensão da classe média convergem para a sustentação do crescimento e de um consumo interno robusto. O Sudeste da Ásia parece estar preparado para contornar os próprios gargalos internos e navegar os diferentes riscos globais, a exemplo das novas tarifas comerciais norte-americanas, mantendo-se como um dos pilares da economia mundial.

A ASEAN E A PARCERIA ECONÔMICA REGIONAL ABRANGENTE (RCEP)

O grande acordo comercial asiático conhecido como *Regional Comprehensive Economic Partnership* (RCEP) reúne, além da ASEAN, a China, o Japão, a Coreia do Sul, a Austrália e a Nova Zelândia, totalizando 16 economias. A RCEP foi assinada em novembro de 2020 e encontra-se em vigor desde janeiro de 2022. Abarcando 30% da população mundial, 30% do PIB global e 28% das trocas comerciais internacionais, a RCEP é o maior acordo comercial do mundo.

A ASEAN desempenhou papel fundamental para o sucesso das negociações, que se estenderam de 2012 a 2020, atuando desde o início como coordenadora central. A RCEP evoluiu a partir de iniciativas bilaterais ASEAN+3 (China, Japão e Coreia do Sul) e ASEAN+6 (com a entrada da Índia, que viria a se retirar das negociações em 2019¹⁷, Austrália e Nova Zelândia), ficando a definição da agenda e das regras de engajamento sempre a cargo da ASEAN. O emprego da sua metodologia diplomática característica – o chamado *ASEAN way*, baseado em consenso,

16. Manufatura (30%) e turismo (5%-10%) são medidos pelo método da produção, que calcula a contribuição de cada setor ao PIB. Consumo (60%) e exportações (40%) são componentes do PIB calculados pelo método da despesa, que decompõe o PIB em categorias de gastos (consumo, investimento, governo e exportações líquidas).

17. A Índia anunciou oficialmente sua retirada das negociações em 4 de novembro de 2019, durante uma cúpula da ASEAN em Bangkok, Tailândia. O anúncio foi feito na reta final da conclusão do acordo, que seria assinado pelos outros negociadores em 15 de novembro de 2020. Citam-se entre as motivações da decisão o déficit comercial indiano com a China, pressões domésticas por temor a um impacto negativo em setores vulneráveis (agricultura, manufatura) e a não obtenção de concessões específicas para certos serviços indianos (TI e farmacêuticos).

Muito menos lembrado é o fato de a Índia estar sendo àquela altura cortejada de perto pelos EUA, que desejavam promovê-la como pilar de uma estratégia "Indo-Pacífica" (por oposição ao conceito clássico de "Ásia-Pacífico") para a região, em um esforço que terminou por não trazer os efeitos esperados. A retirada da Índia da RCEP correspondeu, naquele momento, a um alinhamento tácito com os interesses americanos, especialmente em meio à confrontação comercial EUA-China. Hoje, vemos a imposição arbitrária de tarifas norte-americanas sobre a Índia, uma aproximação Índia-Rússia movida por aquisição indiana de energia russa e a busca indiana por maior entendimento com a China. A saída da RCEP significou a perda para a Índia de acesso preferencial a importantes cadeias de suprimento regionais; o acordo deixa a porta aberta para o país vir a se juntar futuramente.

flexibilidade e negociações inclusivas – agilizou o processo ao centralizar decisões, reduzir duplicações e garantir que as negociações avançassem em rodadas anuais sob a presidência rotativa da Associação.

A RCEP proporciona aos Estados-partes, entre outros benefícios, a eliminação ou redução de tarifas, regras de origem cumulativas ditas “diagonais”, facilitação de investimentos e padronização do comércio digital. O acordo elimina ou reduz tarifas em mais de 90% dos bens em até 20 anos – com prazos estendidos para países menos desenvolvidos (até 25 anos no caso do Camboja). Suas regras de origem diagonais, baseadas em 40% de valor regional agregado, permitem que insumos de qualquer Estado-parte sejam contados para qualificação preferencial. A facilitação de investimentos é conduzida por meio de listas negativas (liberalização automática exceto reservas explícitas), proibição de requisitos de desempenho (como transferência obrigatória de tecnologia, com exceções transitórias para Estados-partes menos desenvolvidos) e padronização do comércio digital, com disposições sobre fluxos de dados transfronteiriços e proteção de informações pessoais, sem localização forçada de servidores por padrão. A facilitação aduaneira alinha-se ao Acordo de Facilitação do Comércio da OMC, com liberação de mercadorias em 48 horas, equivalendo a uma redução adicional de 9% em barreiras não tarifárias.

Da perspectiva específica da ASEAN, a RCEP fortalece cadeias produtivas e comerciais intra-asiáticas, encoraja o aumento do volume de investimento estrangeiro e incrementa a competitividade de cada um dos membros da Associação. A integração de suas economias menores, como o Vietnã e o Camboja, a redes lideradas por China, Japão e Coreia do Sul, especialmente em eletrônicos e automotivos, é particularmente bem-vinda. O acordo incrementa ainda a competitividade dos Estados-partes ao harmonizar normas de propriedade intelectual, concorrência e apoio a pequenas e médias empresas, por meio de comitês de cooperação.

À exceção de dois ou três artigos lançados à época da entrada em vigor, não parece haver no Ocidente análises objetivas, abrangentes e sobretudo contínuas ao longo do tempo sobre os efeitos do que é, concretamente, o maior instrumento comercial do mundo e o primeiro na história a reunir a China e o Japão.

A – escassa – cobertura da imprensa e de *think tanks* sobre o novo acordo tende, com um único e mesmo instinto, a cultivar viés negativo, enfatizando deficiências percebidas, como a ausência de cláusulas mais robustas sobre propriedade intelectual. Muito criticada é a suposta falta de ambição na área tarifária, natural, no entanto, em um ambiente comercial em que, graças à rede pré-existente de ALCs da ASEAN (com China, Coreia do Sul, Japão, Austrália

e Nova Zelândia, e entre os próprios Estados-membros), os cortes incidem sobre uma base tarifária já inicialmente baixa, consolidando vantagens recíprocas previamente concedidas entre as Partes.

Que um arranjo comercial maior do que o da União Europeia, em vigor há quase quatro anos, tenda a ser ignorado ou minimizado pelos observadores especializados reflete a reverência com que ainda são encaradas as sensibilidades da Corte Celestial dos nossos dias. O fato de haverem se juntado à RCEP os parceiros históricos dos Estados Unidos na Ásia – Japão e Coreia do Sul, Austrália e Nova Zelândia – tampouco encoraja os comentaristas profissionais a admitir que estamos frente a um divisor de águas da integração asiática, cujo impacto inovador vai muito além de questões tarifárias ou de propriedade intelectual.

Integrada pelas economias gigantescas da China, do Japão e da própria ASEAN, e abrangendo comércio eletrônico, concorrência, compras governamentais, harmonização de regras de origem, facilitação alfandegária, facilitação de comércio e integração de cadeias de suprimentos, a RCEP traz repercussões expressivas sobre as relações de comércio entre os seus integrantes e entre estes e o mundo¹⁸. No espírito dos últimos cortesãos da Cidade Proibida, o silêncio parece ser a melhor saída diante de uma realidade que já não se tem como controlar.

Para a ASEAN, responsável desde o primeiro momento pela condução eficiente da negociação, o novo pacto multiplica parcerias, amplia resiliência econômica e promove o crescimento inclusivo no interior da Associação. Como supervisor da implementação da RCEP, o Secretariado da ASEAN monitora sua execução, coordena a resolução de disputas, facilita revisões necessárias e mantém a RCEP alinhada aos objetivos de liberalização comercial, cooperação econômica e promoção da integração comercial regional. A RCEP reforça a centralidade da ASEAN na arquitetura econômica asiática e posiciona a ASEAN como plataforma comercial indispensável.

O BRASIL NO CONTEXTO GLOBAL

O Brasil é uma das grandes economias do mundo. A partir de 1975, passou a figurar entre as dez maiores economias globais em termos de PIB nominal, com

18. "Civilizations die from suicide, not by murder", dizia Arnold Toynbee em uma passagem conhecida de *A Study of History* (1934, 38). Os Estados Unidos se retiraram, em janeiro de 2017, da negociação da Parceria Transpacífica (TPP), concebida originalmente como ferramenta de contenção da expansão comercial da China. Já sob a forma de Acordo Abrangente e Progressivo para a Parceria Transpacífica (CPTPP), que tomou após a surpreendente retirada dos EUA, esse instrumento foi adotado em 2018 e é integrado por 11 países (Austrália, Brunei, Canadá, Chile, Japão, Malásia, México, Peru, Nova Zelândia, Singapura e Vietnã), sete dos quais integram a RCEP. Em 2021, a China formalizou seu pedido de adesão ao CPTPP, no que foi seguida, poucos dias depois, por Taiwan. Os Estados Unidos não integram hoje qualquer arranjo econômico formal de relevo na Ásia.

apenas três interrupções temporárias – nos primeiros anos da década de 1980, na virada dos anos 2000 e durante o biênio da pandemia de Covid-19¹⁹. Fora desses intervalos, manteve-se de forma consistente entre a quinta e a décima posição mundial, decorrência da importância de seus setores primário e industrial na formação do produto nacional. Em paridade de poder de compra, o Brasil situa-se atualmente no sétimo lugar mundial, reflexo da dimensão de seu mercado interno e do poder de consumo relativo de sua população.

O país ocupa metade da área da América do Sul e corresponde à metade da sua população; seu PIB de cerca de US\$ 2,36 trilhões equivale à metade do PIB sul-americano. Gigantesca potência exportadora global, é o maior produtor de petróleo da América Latina. Exerce liderança nas discussões multilaterais de comércio e de combate à mudança do clima; integra tanto o BRICS quanto o G20; preside neste momento a Cúpula Mundial do Clima; é apreciado universalmente por sua tradição conciliatória e capacidade de negociação e mediação.

No ranking do comércio global (OMC), o Brasil está entre os 25 maiores exportadores. Em termos de produto agrícola, é um dos três maiores exportadores globais, rivalizando com os Estados Unidos e com a União Europeia como um dos principais fornecedores de alimentos para os grandes mercados asiáticos. O país é o principal exportador global de soja, café, açúcar, suco de laranja, carne bovina e carne de frango.

As commodities respondem por cerca de 60% das exportações brasileiras, com predominância da soja, o principal item (15% das vendas externas); seguida por minério de ferro (12%, segundo maior exportador mundial) e carne bovina (6%)²⁰. Os produtos manufaturados representam cerca de 35% a 40% das exportações, impulsionadas pelas vendas de veículos e dos setores aeroespacial e de defesa (Embraer) e de siderurgia. Computados tanto bens quanto serviços, uma comparação entre os principais parceiros comerciais do Brasil em 2024, último ano para o qual há dados completos neste momento, mostra os seguintes resultados²¹:

19. Entre 1982 e 1984, durante a crise da dívida externa e recessão, caiu para a 11ª- 12ª posição, sob impacto da crise da dívida e recessão. De 1999 a 2006, a desvalorização cambial e o baixo crescimento levaram o país às posições 11ª a 14ª. Mais recentemente, entre 2020 e 2021, a pandemia de COVID-19 e a depreciação do real resultaram em uma queda para 12ª-13ª, interrompendo temporariamente a trajetória de consistência entre as primeiras dez economias, que se mantém desde 1975, com destaque para o pico na 5ª posição em 2011.

20. Em 2024, os oito principais produtos exportados incluíram petróleo bruto, soja em grão, minérios de ferro e concentrados, açúcar, óleos de petróleo processados, café, carne bovina congelada e polpa de madeira química não dissolvida (MDIC 2024).

21. Fontes: para Estados Unidos, MDIC (Comex Stat), Banco Central, Bureau of Economic Analysis (BEA); para China, MDIC (Comex Stat), Banco Central, Administração Geral de Alfândegas da China; para União Europeia, MDIC (Comex Stat), Banco Central, Eurostat; para ASEAN, MDIC (Comex Stat), Banco Central, IBRE/FGV; para Argentina, MDIC (Comex Stat), Banco Central, INDEC.

Estados Unidos	US\$ 82,6 bilhões
China	US\$ 76 bilhões
União Europeia	US\$ 44,5 bilhões
Argentina	US\$ 12 bilhões
ASEAN	US\$ 10,7 bilhões

Tabela 5 – Valores em US\$ que o Brasil importou dos principais parceiros comerciais em 2024.

China	US\$ 118 bilhões
Estados Unidos	US\$ 54,4 bilhões
União Europeia	US\$ 47 bilhões
ASEAN	US\$ 26,56 bilhões
Argentina	US\$ 12,3 bilhões

Tabela 6 – Valores em US\$ que o Brasil exportou dos principais parceiros comerciais em 2024.

China	US\$ 194 bilhões
Estados Unidos	US\$ 137 bilhões
União Europeia	US\$ 91 bilhões
ASEAN	US\$ 37 bilhões
Argentina	US\$ 24 bilhões

Tabela 7 – Corrente de comércio (bens + serviços) entre os principais parceiros comerciais do Brasil em 2024.

A China, principal parceiro comercial desde 2009, absorveu praticamente 20% das exportações brasileiras no ano, com superávit em favor do Brasil da ordem de cerca de US\$ 42 bilhões. A corrente de comércio do Brasil com a China equivale a 85% da soma das correntes com os dois parceiros seguintes, EUA e UE.

Os Estados Unidos, segundo maior parceiro, receberam menos de 10% das exportações, com déficit contra o Brasil da ordem de US\$ 28 bilhões, decorrente da importação de manufaturados, tecnologia e serviços como *royalties* e remessas de lucros. Com a União Europeia, a corrente de comércio foi de US\$ 91,5 bilhões (15,3%), com ligeiro superávit brasileiro de US\$ 2,5 bilhões.

Em relação à ASEAN, a corrente de comércio totalizou, conforme se observa, aproximadamente US\$ 37 bilhões, com superávit robusto de US\$ 15,5 bilhões para o Brasil (20% do superávit da balança comercial brasileira em 2024), colocando a Associação solidamente entre os cinco principais parceiros comerciais do Brasil (MRE 2025a; APEX Brasil 2025).

O comércio exterior brasileiro abarca forças e vulnerabilidades. Enquanto uma base sólida em commodities sustenta superávits, é desejável uma maior medida de diversificação da pauta exportadora com vistas a mitigar riscos. Uma política sistemática de aproximação com a ASEAN, somada a iniciativas de inovação, reindustrialização e multiplicação de parcerias comerciais, oferece oportunidades para o Brasil continuar a consolidar ganhos globais.

IMPORTÂNCIA COMERCIAL DA ASEAN PARA O BRASIL

A ASEAN emerge como parceiro comercial do Brasil em franco crescimento. A corrente de comércio (bens + serviços) passou de cerca de US\$ 3,5 bilhões em 2002 para US\$ 37 bilhões em 2024, representando um aumento de mais de dez vezes em 22 anos, impulsionado pela competitividade do agronegócio e da mineração brasileiros. As exportações brasileiras concentram-se em soja, minério de ferro, carne bovina, açúcar e milho, com destaque nesses produtos para Indonésia e Malásia. O Brasil importa da ASEAN sobretudo eletrônicos e semicondutores (40%), máquinas (25%), têxteis (15%) e químicos (10%).

O comércio Brasil-ASEAN tem crescido a uma média de cerca de 15% a cada ano desde 2020, contrastando com a estagnação relativa dos mercados tradicionais.

Casos emblemáticos ilustram a supremacia de determinados membros da ASEAN sobre parceiros comerciais históricos do Brasil na Europa e na América Latina. Impulsionadas por refinados de petróleo e aviões, em 2024 as exportações para Singapura atingiram US\$ 7,9 bilhões – mais do que o Brasil exportou para a Alemanha (US\$ 5,85 bilhões) e mais do dobro do que o Brasil exportou para a França (US\$ 3 bilhões).

Em 2024, o fluxo comercial com a Malásia atingiu US\$ 5,9 bilhões, com as exportações superando US\$ 4,3 bilhões e um superávit para o Brasil, portanto, de US\$ 2,8 bilhões. As vendas brasileiras concentraram-se em minério de ferro (37%) e óleos brutos de petróleo (28%). O Brasil exportou mais para a Malásia em 2024 do que para Itália, Portugal, Reino Unido ou França (MRE 2025b).

A Indonésia, com US\$ 4,5 bilhões em compras (soja e farelo de soja), superou o Reino Unido (US\$ 3,34 bilhões). O Vietnã, com importação de US\$ 4,2 bilhões

(soja e carnes suínas), superou o Peru (US\$ 3,8 bilhões). Já a Tailândia, que comprou do Brasil US\$ 3,45 bilhões (etanol e frango), superou a França (US\$ 3 bilhões). Esses fluxos apontam para uma pauta diversificada e resiliente, com espaço para ampliação significativa das exportações brasileiras à medida que a ASEAN prossiga em seu caminho rumo a graus cada vez maiores de afluência e desenvolvimento (MDIC 2024).

O quadro abaixo mostra os onze membros da ASEAN, com a enorme diversidade de perfis econômicos e demográficos que os caracteriza, apresentados em ordem decrescente de volume de importação de produtos brasileiros²²:

PAÍS	PIB	PPC	PERFIL DA ECONOMIA	POP	IMPORTOU DO BR EM 2024
Singapura	US\$ 565 bi	US\$ 92.000	finanças	6 milhões	US\$ 7,9 bi
Indonésia	US\$ 1,43 tri	US\$ 5.030	mineração	284 milhões	US\$ 4,5 bi
Malásia	US\$ 445 bi	US\$ 3.140	eletrônicos	33,9 milhões	US\$ 4,3 bi
Vietnã	US\$ 485 bi	US\$ 4.741	manufatura	102 milhões	US\$ 4,2 bi
Tailândia	US\$ 546 bi	US\$ 7.770	automotivo	70 milhões	US\$ 3,45 bi
Filipinas	US\$ 497 bi	US\$ 4.350	serviços	114 milhões	US\$ 2,12 bi
Camboja	US\$ 48,8 bi	US\$ 2.870	agricultura	17,4 milhões	US\$ 26 mi
Laos	US\$ 16,3 bi	US\$ 2.100	hidrelétrica	7,8 milhões	US\$ 23 mi
Timor Leste	US\$ 2,02 bi	US\$ 1.343	petróleo	1,5 milhões	US\$ 21 mi
Mianmar	US\$ 64,9 bi	US\$ 1.180	agricultura	54,8 milhões	US\$ 19 mi
Brunei	US\$ 16 bi	US\$ 34.970	petróleo	450 mil	US\$ 3 mi
TOTAL	US\$ 4,12 tri			690 milhões	US\$ 26,56 bi

Tabela 8 – Países-membros da ASEAN em ordem decrescente de volume de importação de produtos brasileiros.

Conforme discutido acima, os países da ASEAN representam para o Brasil um mercado de consumo de 690 milhões de pessoas (três vezes a população brasileira), cada vez mais afluyente, com PIB conjunto que equivale a quase duas vezes o PIB brasileiro. Nesse ambiente dinâmico, que é uma usina geradora de riqueza e comércio, há enorme espaço de ampliação para a entrada de produtos brasileiros, tanto manufaturados quanto do agronegócio.

22. Fontes: para PIB e PIB per capita, estimativas do FMI e do Banco Mundial para 2025; para volumes de comércio (MDIC 2024).

INTERESSE PARA O BRASIL NA APROXIMAÇÃO CRESCENTE COM A ASEAN

A parceria entre o Brasil e a Associação não se limita ao comércio. O Brasil obteve, em 2022, a condição de parceiro de Diálogo Setorial da ASEAN, que divide com outros sete países²³ e que confere um bem-vindo grau de institucionalização política aos contatos com a região. Em dezembro de 2023, adotou-se um plano de ação para a parceria Brasil-ASEAN intitulado “Áreas de Cooperação Prática 2024-2028”, que define prioridades concretas de atuação conjunta. Os diferentes eixos do plano privilegiam a concertação em áreas como comércio e investimentos, agricultura sustentável, transição energética, conectividade digital, mudanças climáticas e governança global.

O Brasil é o único parceiro de Diálogo Setorial da ASEAN na América Latina. É o único parceiro de Diálogo Setorial a manter representação permanente, aberta em março de 2024, junto ao Secretariado da ASEAN, sediado em Jacarta.

A condição de parceiro de Diálogo Setorial não se confunde, porém, com a de parceiro de Diálogo, mais complexa e abrangente, que a ASEAN mantém com China e Estados Unidos, ou Japão e União Europeia²⁴. O diálogo pleno (por oposição ao setorial, focalizado em temas específicos) proporciona a participação do país parceiro em foros de alto nível, como as cúpulas anuais de líderes da ASEAN e as reuniões ministeriais em áreas diversas, com cooperação estratégica ampla.

O presidente Lula convidou o Primeiro-Ministro da Malásia, Anwar Ibrahim, a participar da Cúpula do G20 e da Cúpula do BRICS, que o Brasil sediou no Rio de Janeiro em novembro de 2024 e em julho de 2025. Ao assumir a Malásia a presidência rotativa da ASEAN, Anwar Ibrahim retribuiu o gesto – apesar de o Brasil não ser parceiro de diálogo pleno – convidando Lula, na condição de *Guest*

O Brasil obteve, em 2022, a condição de parceiro de Diálogo Setorial da ASEAN, que divide com outros sete países e que confere um bem-vindo grau de institucionalização política aos contatos com a região.

23. São os seguintes os demais parceiros de diálogo setorial com a ASEAN: África do Sul, Emirados Árabes Unidos, Marrocos, Noruega, Paquistão, Suíça e Turquia.

24. São os seguintes os parceiros de diálogo pleno com a ASEAN: Austrália, Canadá, China, Coreia do Sul, Estados Unidos, Índia, Japão, Nova Zelândia, Reino Unido, Rússia e União Europeia.

of the Chair, a tomar parte da reunião de cúpula da Associação que se realizou em Kuala Lumpur em outubro de 2025.

A participação inédita de um chefe de Estado brasileiro em uma cúpula da ASEAN, a 47^a, é um avanço histórico nas relações entre o Brasil e o bloco asiático e constitui um marco eloquente da aproximação política do Brasil com o Sudeste da Ásia. Tratou-se de um ponto alto da política externa do presidente Lula em seu terceiro mandato.

À margem da cimeira da ASEAN (26 de outubro), o presidente realizou visitas bilaterais de Estado à Indonésia (23 de outubro), maior economia da região; e à própria Malásia (25 de outubro), importante investidor no Brasil no setor de petróleo e gás. Em Jacarta, visitou a sede da Associação, onde anunciou o interesse do Brasil em passar a ser parceiro de diálogo pleno da ASEAN, em uma coordenação tanto política quanto econômica cada vez mais próxima. Em Kuala Lumpur como em Jacarta, tratou-se muito da ampliação dos volumes bilaterais de comércio e investimentos com o Brasil, já expressivos em si.

O observador externo vê na Associação um bloco coeso, amparado por uma formidável rede de pactos comerciais ASEAN+1²⁵ e, mais recentemente, pelas disposições abrangentes da RCEP. Para terceiros países, o alto grau de coordenação intra-ASEAN, bem como entre a ASEAN e seus grandes contrapartes asiáticos, apresenta oportunidades, mas também desafios. Ao valorizar insumos de qualquer país do bloco, não apenas do produtor final, a regra da RCEP de cumulatividade diagonal mencionada acima, por exemplo, incentiva a integração das cadeias produtivas internas, entre as Partes. Para um parceiro de fora, pode surgir risco de desvio de comércio, com redução de mercado para atores externos ao acordo; marginalização em cadeias globais, com preferência por insumos regionais; e menor competitividade devido a tarifas residuais para não membros.

Essas questões reforçam, para o Brasil como para qualquer parceiro extrarregional, a necessidade de mitigação de riscos na aproximação comercial com a Associação. O caminho da conclusão de acordo com a ASEAN está sempre aberto, com as complexidades inerentes a negociações dessa natureza. A negociação de um ALC entre a ASEAN e a União Europeia chegou a ser encetada, mas, por limitações em seus próprios processos de coordenação interna, a UE passou a privilegiar instrumentos individuais com países da Associação (UE-Singapura em 2019; UE-Vietnã em 2020). Há discussões formais em andamento entre a ASEAN e o Canadá e a

25. Em ordem decrescente de data de entrada em vigor: Área de Livre Comércio ASEAN-Hong Kong; Acordo de Livre Comércio ASEAN-Índia, Área de Livre Comércio ASEAN-Austrália-Nova Zelândia; Parceria Econômica Abrangente ASEAN-Japão; Área de Livre Comércio ASEAN-Coreia do Sul; Área de Livre Comércio ASEAN-China; e a Área de Livre Comércio da ASEAN propriamente dita.

ASEAN e o Conselho de Cooperação do Golfo. Com o MERCOSUL, um diálogo exploratório estende-se desde 2007, sem negociação formal até o momento.

O Brasil conta, por meio do ALC entre o MERCOSUL e Singapura²⁶, assinado em dezembro de 2023 e ainda pendente de internalização pelas Partes, com um instrumento comercial com Estado-membro da ASEAN. Apresentando-se ou não a oportunidade futura de lançamento de negociação de acordo comercial entre os dois blocos regionais, parece certo o interesse para o Brasil na consolidação crescente de seus laços formais com a ASEAN.

Mais além do aprofundamento das complementaridades econômico-comerciais, de claro interesse mútuo, pareceria haver amplo espaço para a diversificação de oportunidades e para que o Brasil proponha à ASEAN novas áreas de concertação – do diálogo econômico e financeiro à coordenação em foros multilaterais e à promoção de cooperação concreta nas mais diversas esferas.

PERSPECTIVAS

Em cenário de rápidas transformações geoeconômicas e de instabilidade geoestratégica global aguda, caracterizado pela imprevisibilidade da atuação política e comercial dos Estados Unidos em relação a parceiros tradicionais e aliados históricos – e em meio à aparente apatia das lideranças europeias –, é inegável o interesse para o Brasil na reafirmação da importância estratégica do Sudeste da Ásia.

A relação de comércio entre o Brasil e a ASEAN obedece a dinâmica própria, ditada pela grande competitividade brasileira e crescente demanda asiática. O Brasil só tem a ganhar, por outro lado, ao buscar o aprofundamento também da relação política com o bloco, procurando assegurar níveis cada vez mais altos de aproximação estrutural com a Associação.

As sanções comerciais arbitrárias de que o Brasil, e outros grandes exportadores, têm sido objeto sugerem a necessidade urgente de multiplicação de destinos de exportação. Continuando a cultivar seu importante acervo de relações comerciais e políticas com Estados Unidos, Europa e os vizinhos do MERCOSUL, há muito a ganhar para o Brasil na condução de uma política sistemática de aproximação com a Ásia e, na Ásia, com os países da ASEAN.

Estão em jogo para o Brasil questões vitais, como diversificação de mercados; incremento das exportações, incluindo as de maior valor agregado; redução de

26. O primeiro ALC a ser concluído entre o MERCOSUL e um dos Estados-membros da ASEAN. Encontram-se em negociação um Acordo de Parceria Econômica Abrangente (APEA) entre o MERCOSUL e a Indonésia e um ALC entre o MERCOSUL e o Vietnã.

exposição a mercados voláteis; atração de investimentos e cooperação tecnológica. Apesar dos possíveis desafios (concorrência em setores de manufatura, por hipótese), o Brasil se beneficiará ao investir em diálogo cada vez mais estreito com a ASEAN, voltado à superação de barreiras logísticas, harmonização de padrões sanitários, solução de eventuais irritantes comerciais pontuais e ao desenvolvimento da diplomacia econômica em seu sentido mais amplo.

Uma das regiões economicamente mais dinâmicas do mundo, cuja situação econômica e geográfica a torna epicentro das novas dinâmicas de competição econômico-comerciais globais, a ASEAN aparece como parceiro indispensável para a reorientação da inserção internacional brasileira. Em um mundo que evoluiu, que continua a se transformar, o eixo Brasil-ASEAN fortalece a soberania econômica do Brasil, promovendo o necessário crescimento inclusivo em alinhamento com parcerias Sul-Sul previsíveis e duradouras. ■

A relação de comércio entre o Brasil e a ASEAN obedece a dinâmica própria, ditada pela grande competitividade brasileira e crescente demanda asiática.

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BOOK REVIEW

Feldman, Luiz. 2025. *Sobre hemisférios: capítulos da geopolítica brasileira*.
Rio de Janeiro, Topbooks. 203

Leticia Pinheiro



Vintage Brazil map with quill. Image: Shutterstock.

Sobre os ditos e os não ditos

Feldman, Luiz. 2025. *Sobre hemisférios: capítulos da geopolítica brasileira*. Rio de Janeiro, Topbooks.

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Sobre os ditos e os não ditos

Feldman, Luiz. 2025. *Sobre hemisférios: capítulos da geopolítica brasileira*. Rio de Janeiro, Topbooks.

Leticia Pinheiro

A geopolítica impõe-se ao Brasil de tempos em tempos. Os problemas externos não são compreendidos, nesses momentos, como secundários: tornam-se existenciais. Exigem como resposta uma definição fundamental de espaço, uma tomada de posição no sentido forte do termo, a partir da qual o país busca se proteger dos perigos vindos de fora e abrir o mundo, ou parte dele, à influência brasileira (Feldman 2025, 19).

A leitura desse parágrafo, que dá início à Introdução do livro de Luiz Feldman *Sobre hemisférios: capítulos da geopolítica brasileira* (Autêntica Editora 2025), imediatamente nos remete à interven-

ção militar estadunidense na Venezuela – codinome Operação Resolução Absoluta, ocorrida em 3 de janeiro deste ano de 2026. Mais precisamente, nos remete à reflexão sobre o posicionamento brasileiro a respeito do fato em si e do que ele representa para o país.

Embora indiscutível, a atualidade dessa e de outras reflexões de Feldman neste livro não se reduz ao ocorrido no início deste ano. O fato de a sentença acima ter sido redigida antes do episódio referido, na realidade só reforça a perenidade das questões abordadas na obra, quando se trata de refletir sobre a inserção internacional do Brasil.

Mas, como o próprio Feldman afirma, “as concepções concretas da ordem regional e interesse extraconti-

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nental são (...) em uma palavra, históricas. Mudam com o tempo, reagem às circunstâncias oscilantes e podem contrastar deliberadamente entre si. Formuladas em contextos específicos, podem transcendê-los, revelando-se longevas ou reincidentes” (20). E, por serem questões basilares para o país, sempre haverá debates a seu respeito. E tal como as concepções mudam historicamente, também suas interpretações se redesenham com a história.

A obra é, sem dúvida, uma contribuição ímpar para os estudiosos e interessados no pensamento político brasileiro, em particular sobre sua dimensão internacional. Mas sua relevância também é indiscutível para os que se dedicam a compreender as escolhas de política externa, os porquês e como foram feitas.

Abordando a tensão entre os distintos sentidos de continente e de extracontinentalidade, Feldman nos conduz pela história do Brasil por meio dos fatos e das reflexões dos seus pensadores. Na qualidade de diplomata e, mais que isso, de estudioso do “pensamento

internacional brasileiro” – por ele descrito como “uma camada posterior ao pensamento político e social e anterior ao pensamento diplomático” (Feldman 2023) –, o autor analisa, em quatro distintos capítulos do livro, telegramas, cartas, discursos, enfim, textos diversos em que Paulino José Soares de Sousa, o Visconde do Uruguai, Joaquim Nabuco, Gilberto Freyre e Afonso Arinos discorrem e prescrevem qual deveria ser o comportamento internacional do país.

A obra é, sem dúvida, uma contribuição ímpar para os estudiosos e interessados no pensamento político brasileiro, em particular sobre sua dimensão internacional. Mas sua relevância também é indiscutível para os que se dedicam a compreender as escolhas de política externa, os porquês e como foram feitas. Enfim, para os analistas de política externa. Esta, certamente, não se trata de uma dedução original. O próprio Feldman, por diversas vezes, refere-se a esse aspecto da sua obra. E o faz com a clareza e a elegância que lhe são características, afirmando:

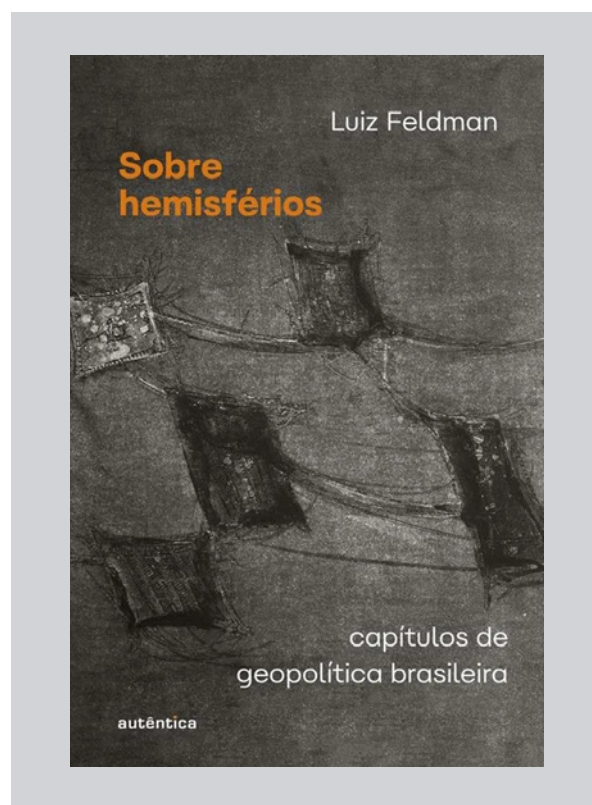
Cada uma dessas concepções de ordem regional e de interesse extracontinental supõe o seu próprio horizonte. É característico dos conceitos, na verdade, terem tanto uma dimensão descritiva quanto uma dimensão antecipatória. Essa segunda qualidade os torna “diagnósticos com intenções prognósticas”. E, como

antecipações de cenários futuros, os conceitos estabelecem horizontes políticos e sociais que orientam a ação rumo à mudança estrutural e tornam essa mudança visível e passível de avaliação (2025, 37).

Embora o autor diga que, dessa forma, o que faz é uma “história diplomática entrelaçada a uma história intelectual” (idem), eu sustento que o que ele faz, ou melhor, o que ele também faz, ao refletir sobre a prática diplomática, é análise de política externa entrelaçada ao estudo do pensamento internacional brasileiro, neste sentido ancorado em duas riquíssimas subáreas da Ciência Política.

E é neste cruzamento de saberes que Feldman nos mostra como a diplomacia brasileira fez frente à geopolítica por meio das noções: de América do Sul ou América Meridional, entre 1843 e 1866, examinando os escritos do Visconde do Uruguai; de Hemisfério Ocidental, de 1899 a 1909, ao percorrer os diários e cartas de Joaquim Nabuco; de trópico, de 1948 a 1959, com Gilberto Freyre; e de Hemisfério Sul, entre 1961 e 1963, com Afonso Arinos.

Dentre os inúmeros aspectos que eu gostaria de destacar da reflexão de Feldman ao tratar do pensamento do Visconde do Uruguai sobre a grandeza do Brasil e a centralidade da América Meridional, um em particular me chamou a atenção. Ao situar o Visconde



no ponto de partida da tradição sul-americana da diplomacia brasileira e atribuir ao Barão do Rio Branco a posição de seu seguidor e não mais de precursor dessa orientação, Feldman ao mesmo tempo resgata o pioneirismo do primeiro e concede ao Barão um lugar mais temporal, diria até mais humano, ao relativizar sua pesada fama de ser o fundador de quase todas as tradições da diplomacia brasileira.

Em seguida, Feldman nos mostra a riqueza de visões de que se constitui nosso universo de grandes intérpretes do país, ao tratar das ideias de Joaquim Nabuco sobre o lugar do Brasil no mundo, favorável que era ao monroísmo como um ordenamento regional, em nome da segurança e sobrevivência brasileiras. Aqui, em vez de

protagonismo continental, pensa-se e projeta-se o futuro do Brasil a partir da aliança com os Estados Unidos, naquilo que já foi chamado por Silva (1995) e outros de “americanismo ideológico”, em contraponto ao “americanismo pragmático” do Barão do Rio Branco.

Na sequência, mais uma vez demonstrando que a dimensão internacional do pensamento político brasileiro é plural e diversa, Feldman nos faz percorrer pelas reflexões de Gilberto Freyre. Assim chegamos ao “internacionalismo imperial” de Freyre, essa curiosa equação que traz para o projeto de abertura e projeção transoceânica do Brasil um quê de projeto de dominação, sob a tese da bicontinentalidade do país. E, dentre outras tantas interessantes faces do pensamento de Freyre que Feldman destaca, vale mencionar também a questão racial, nos convidando a aprofundar seu exame na história da diplomacia e da política externa brasileira.

Finalmente, no capítulo em que trata do pensamento de Afonso Arinos, mas também de San Tiago Dantas, Feldman adota como método o *process-tracing*, tão caro aos analistas de política externa. Dessa forma, acompanhamos, pela troca de telegramas entre Arinos e o então chanceler San Tiago Dantas e pelas memórias de outras figuras públicas brasileiras e estrangeiras, notadamente portuguesas, como a posição de Arinos sobre a questão colonial (Angola, em particular) exprime uma visão sobre o lugar do Brasil no mundo, mais em linha

com seus pares do Sul geopolítico – para usarmos uma expressão de hoje. Vemos assim um claro contraponto anticolonialista à concepção de interesse extracontinental abraçada por Freyre, esta de corte indiscutivelmente colonialista.

Por fim, explicando o título desta resenha, lembro que, em outra oportunidade (...), tratei de como se formou a dupla identidade que o diplomata brasileiro exerce no cenário nacional, diplomata enquanto intelectual [através d]a questão dos não ditos que se vincula à tese de que “os agentes estão inevitavelmente inscritos em lugares sociais e sua produção é permeada por não ditos originários (mas não a eles redutíveis) das regras de organização das práticas localizadas nesse lugar”.

O pouco que escrevemos até aqui e os destaques mencionados não correspondem a um quinto do tanto de questões e ideias que Luiz Feldman conseguiu garimpar e reunir em uma narrativa tão fluida quanto instigante

sobre a temática. Para além das fontes secundárias consultadas por Feldman, a pesquisa feita nos livros assinados pelos próprios pensadores analisados, nos jornais de época e principalmente nos arquivos públicos e privados do Brasil e do exterior, reafirma a importância do acesso aos acervos históricos para um trabalho desse calibre.

Impossível também deixar de mencionar a qualidade do texto de Luiz Feldman. De fato, a escrita ao mesmo tempo ágil e profunda, que também se distingue por sua enorme elegância, enriquece ainda mais a qualidade substantiva desta obra. E se isso já não bastasse, Feldman percorre os escritos dos quatro personagens fazendo-os dialogar com opiniões, discursos e falas diversos de seus contemporâneos como quem os testemunhou em tempo real e não como quem os garimpou entre as inúmeras fontes consultadas.

Por fim, explicando o título desta resenha, lembro que, em outra oportunidade, juntamente com Paula Vedoveli, tratei de como se formou a dupla identidade que o diplomata brasileiro exerce no cenário nacional, *diplomata enquanto intelectual* (Pinheiro & Vedoveli 2012, 211-254). Ao fazer isso, dentre outros pontos, levantamos a questão dos *não ditos* que se vincula à tese de que “os agentes estão inevita-

velmente inscritos em lugares sociais e sua produção é permeada por não ditos originários (mas não a eles redutíveis) das regras de organização das práticas localizadas nesse lugar” (Pinheiro & Vedoveli 2012, 247-248). Ou nas palavras do próprio de Certeau, “Certamente não existem considerações, por mais gerais que sejam, nem leituras, tanto quanto se possam estendê-las, capazes de suprimir a particularidade do lugar de onde falo e do domínio em que realizo uma investigação. Essa marca é indelével” (1982, 65). Assim sendo, diria ainda o autor, “É, pois, impossível analisar o discurso histórico [e outros saberes] independentemente da instituição em função do qual ele se organiza silenciosamente [...]” (1982, 71).

Esse, me parece, ser também o caso deste livro. E isso em nada e por nada fragiliza sua contribuição. Ao contrário, eu diria mesmo que o robustece e torna ainda mais relevante sua leitura. Uma tentativa, mesmo que não explícita, de entender as escolhas possíveis do Brasil relativamente ao seu lugar no mundo. Uma reflexão sobre os ditos do Visconde do Uruguai, de Joaquim Nabuco, de Gilberto Freyre e de Afonso Arinos, mas também um convite a pensar nos não ditos dos quatro personagens e do próprio autor. ■

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INTERVIEWS

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Marian Schuegraf, Ambassador of the European Union to Brazil. Picture: EEAS.

"The EU and Brazil Share Deep Cultural Ties, Values, and Even Similar Paths of Regional Integration"

Marian Schuegraf

“The EU and Brazil Share Deep Cultural Ties, Values, and Even Similar Paths of Regional Integration”

MARIAN SCHUEGRAF

Marian Schuegraf is the Ambassador of the European Union to Brazil. During her diplomatic career, she served as German Ambassador to Colombia, Deputy Head of Mission at the German Embassy in Teheran, and Director for Latin America and the Caribbean at the German Foreign Office. In leading positions at the Foreign Office in Berlin, she dealt with East Africa and Personnel. Previous postings abroad include twice New Delhi, India and Addis Ababa, Ethiopia. She is a lawyer by profession and studied at the University of Erlangen/Nuremberg, Germany, as well as the Université de Rennes, France.

(Source: European External Action Service)

The following is the interview given to CEBRI-Journal in March 2026.

What is the strategic importance of deeper political and economic alignment between the European Union and Brazil—particularly in the context of the EU-Mercosur Trade Agreement—in an international environment where rules and norms are increasingly being questioned or undermined?

MARIAN SCHUEGRAF: In an increasingly protectionist and transactional world, the EU-Mercosur Partnership Agreement conveys a strong message of support for multilateralism. It proves the value of trading and cooperating across borders and regions, with mutual trust and respect. The EU has made a strategic choice to deepen partnerships with countries based

on shared values, and the EU-Mercosur agreement is a perfect example. The European Union has proven to be a stable and reliable partner for 77 countries through 44 trade agreements, promoting open and fair trade, based on clear, shared rules.

The EU is already Brazil's second trading partner and leading foreign investor. Building on this solid basis, the [EU-Mercosur] agreement will allow us to establish even closer links across businesses, professional and cultural associations, civil society, scientists, think tanks like CEBRI and its counterparts, and many others in the two regions.

The EU is already Brazil's second trading partner and leading foreign investor. Building on this solid basis, the agreement will allow us to establish even closer links across businesses, professional and cultural associations, civil society, scientists, think tanks like CEBRI and its counterparts, and many others in the two regions. The agreement offers new business

opportunities and concrete benefits for people—jobs, investment, sustainability, and civil society participation. The EU-Mercosur Partnership Agreement sends a powerful and timely message—of openness, cooperation and integration. Prosperity can be shared, respecting the planet, international law, democracy, and common standards.

Turning to trade, thanks to our joint efforts, the combined flow of goods between Brazil and the EU hit a record in 2025, reaching US\$ 100 billion. And in terms of investment stock, Brazil is the fourth destination for EU foreign investment worldwide, focused on sectors that are essential for sustainable development. The second EU-Brazil investment forum later this year in Brasília, in partnership with APEX and CEBRI, will highlight this positive trend as part of our Global Gateway agenda. Last year's inaugural edition in São Paulo, featuring European Council President António Costa, brought together more than 180 participants to discuss strategic opportunities in sustainable energy, critical raw materials, digital infrastructure, and green mobility.

The EU often pursues trade agreements not only for economic gains, but also to reinforce shared principles and values with its partners, such as democracy, human rights, and the rule of law. To what extent do these

normative considerations shape the EU's choice of economic and trade partners?

MS: The EU is founded on values such as human dignity, freedom, democracy equality, rule of law, and human rights. They are laid in the Lisbon Treaty and EU Charter of Fundamental Rights. They are defining our policies inside and outside the EU, and also guiding our partnerships, including economic ones.

One reason why the EU-Mercosur agreement took so long to negotiate was that, during a certain period, we were not yet fully aligned on essential issues such as deforestation and climate change. Today, the agreement is possible because of our shared commitment to values including sustainable development.

European Commission President von der Leyen confirmed: “trade can—and must—be guided by values.” One reason why the EU-Mercosur agreement took so long to negotiate was that, during a certain period, we were not yet fully aligned on essential issues such as deforestation and climate change.

Today, the agreement is possible because of our shared commitment to values including sustainable development.

We are witnessing growing policy alignment across the EU on the so-called “twin transitions” (green and digital). Within this framework, which areas do you see as having the greatest strategic potential for EU-Brazil cooperation?

MS: Indeed, EU policy aligns the green transformation, or decarbonization, and the digital transformation to foster sustainable growth, with the European Green Deal and Digital Europe Programme as framework. Within this context, EU-Brazil cooperation aims at turning converging regulatory philosophies into complementary economic strengths.

The EU-Brazil partnership focuses on the green agenda, combining EU investment, technology, and regulatory frameworks with Brazil's immense biodiversity and renewable energy potential. To help curbing deforestation in the Amazon and other tropical forests, transition towards sustainable forest management and development, the EU is, for example, providing financial guarantees to support sustainable investments in areas such as land restoration, agroforestry systems and carbon sinks. In addition, the EU-Mercosur agreement is expected to boost socio-

bioeconomy exports from Brazil to Europe. To facilitate market access, we are already working on practical measures to support these new value chains, particularly for small and medium companies (SMEs). This includes cooperation on traceability systems, such as Selo Verde, to help ensure that Brazilian agroforestry products can be exported to the EU smoothly. European companies also play a major role in Brazil's renewable energy sector, including electricity generation, transmission and distribution, and are increasingly exploring investments in low-carbon hydrogen and sustainable fuels.

Regarding the digital agenda, the EU and Brazil have a long-standing cooperation, which covers a wide array of topics ranging from regulation of artificial intelligence and online platforms to data governance and inclusive connectivity. A significant milestone was the recent mutual recognition of the EU and Brazilian data protection regimes as substantially equivalent, reflecting the convergence of their respective regulatory frameworks and facilitating secure international data flows. Similar efforts are made towards the mutual recognition of electronic signatures and seals. We also see great potential to advance cooperation on high performance computers and the development of large language models, focused on non-English languages, such as Portuguese and Spanish.

In addition, we are continuing the expansion of the BELLA cable—a modern deep-sea cable, digitally linking Sines in Portugal with Fortaleza in Brazil. This significantly reduces latency and increases data transmission capacity, strengthening collaboration in research, education and innovation. The ongoing expansion of BELLA, including new connections through French Guiana to northern Brazilian states such as Pará and Maranhão, will further extend these benefits by supporting digital inclusion, improving regional connectivity and enabling the development of local digital economies.

In relation to the Mercosur-EU agreement, one recurring concern is that differences in regulatory capacity and development levels may turn sustainability and technical standards into *de facto* trade barriers. How does the European Union envision supporting institutional capacity-building in Mercosur countries so that convergence of standards becomes a cooperative process rather than a source of friction?

MS: The EU does not design trade agreements with the objective of creating trade barriers. On the contrary, the EU-Mercosur agreement aims to promote sustainable growth while supporting regulatory cooperation and convergence over time. Sustainability commitments are an integral part of EU

policy, particularly under the European Green Deal, which aims to transform the EU into a climate-neutral, resource-efficient, and competitive economy while promoting similar standards globally.

The agreement will give Mercosur's industry the time necessary to modernize, grow and compete. It will also encourage good regulatory practices to remove unnecessary barriers, for example in public procurement. Many sectors in Brazil already export successfully to the EU in compliance with European standards. At the same time, cooperation and technical exchanges will be needed to ensure that Mercosur producers can fully harness the agreement's potential.

To support this process, the agreement comes with a substantial cooperation package of up to 1.8 billion euros currently under discussion with Mercosur countries. It will provide technical assistance to help roll out the agreement in practice, support strengthening SMEs, local communities, family farms, and potentially marginalized sectors of society across Mercosur.

It is encouraging to see the swift progress of ratification in Brazil and other Mercosur countries, which will help maintain momentum in Europe as well.

In a context of growing great-power competition and supply-chain fragmentation, to what extent does the EU see the

Mercosur agreement as part of its broader strategy of open strategic autonomy carried out by the EU? And how important is Brazil within this framework—not only as a trade partner, but as a political actor in shaping a more multipolar and rules-based international order?

MS: De-risking supply chains has increasingly become a necessity. The COVID-19 pandemic exposed global vulnerabilities, and Russia's invasion of Ukraine further accelerated the EU's efforts to reduce strategic dependencies, particularly in the energy sector. This has led the EU to accelerate the deployment of renewable energy, improve energy efficiency and diversify its sources of supply. Similar efforts are now being extended to other strategic sectors, including critical raw materials.

[The EU-Mercosur agreement] has clear potential to help reduce dependencies in areas such as raw materials and energy. Critical raw materials are a promising example of a win-win cooperation, allowing Brazil to develop its own processing capacity and the EU to diversify sources of supply.

Although negotiations on the EU-Mercosur agreement began in a very different context, the agreement has clear potential to help reduce dependencies in areas such as raw materials and energy. Critical raw materials are a promising example of a win-win cooperation, allowing Brazil to develop its own processing capacity and the EU to diversify sources of supply.

Beyond these considerations, the EU and Brazil share deep cultural

ties, values, and even similar paths of regional integration. Building on this solid fundament, Brazil for the EU is a key partner of choice in our efforts to promote the international rule of law and a fair, balanced world order. The growing frequency and depth of EU-Brazil exchanges at all levels underlines our joint ambition to take this essential partnership to ever further heights. 🇪🇺

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Photo: Brian Winter. CEBRI Conference, February 4, 2026, Rio de Janeiro. Picture: Lucas Machado.

"President Trump is Currently Interested in a More Constructive Relationship
with President Lula and with Brazil"

Brian Winter

“President Trump is Currently Interested in a More Constructive Relationship with President Lula and with Brazil”

BRIAN WINTER

Brian Winter is the editor-in-chief of Americas Quarterly and a seasoned analyst of Latin American politics, with more than 25 years following the region’s ups and downs. He has been described as “one of the best chroniclers and analysts of Latin America” by Foreign Affairs, and “the best foreign expert on Brazil of this moment” by GloboNews. Brian lived for a decade in Brazil, Argentina and Mexico as a journalist for Reuters before joining Americas Society and Council of the Americas, where he is also the vice president for policy. His books include *Why Soccer Matters*, a New York Times bestseller he wrote with the Brazilian soccer legend Pelé; *The Accidental President of Brazil*, co-written with President Fernando Henrique Cardoso; and *The Ugliest City You’ll Ever Love*, a book about São Paulo to be published in early 2026. Brian speaks frequently about Latin America to investors, media, universities and other audiences around the world. A graduate of the University of Texas, he speaks Portuguese and Spanish and is a prolific barbecuer and cook. Follow him on social media @BrazilBrian.

(Source: <https://americasquarterly.org>)

You argue that Trump's recent engagement with Brazil reflects more of a tactical cooling-off than a strategic reset. What domestic political pressures and international calculations do you see as most decisive behind this shift—and how durable do you think this new tone really is?

BRIAN WINTER: Brazil has reached a new accommodation with President Trump, although this could change quickly. There were definite factors explaining why President Trump altered his strategy after approximately September of last year. One was

It became clear to President Trump that sanctions and tariffs were having the opposite effect of what he intended. Rather than helping President Bolsonaro, they ended up benefiting President Lula. President Trump is currently interested in a more constructive relationship with President Lula and with Brazil. These strategic considerations were central to the shift.

inflation in the United States and the risks implied by Brazilian exports, coffee and meat in particular. There was also a broader global issue involving critical minerals and the urgency that followed China's announcement of the possibility of an embargo on shipments of those minerals to the United States.

Domestic political considerations also mattered. It became clear to President Trump that sanctions and tariffs were having the opposite effect of what he intended. Rather than helping President Bolsonaro, they ended up benefiting President Lula. President Trump is currently interested in a more constructive relationship with President Lula and with Brazil. These strategic considerations were central to the shift.

There is also a view that, on a personal level, President Trump grew tired of dealing with Brazil, had other priorities, and wanted to resolve the issue so it no longer demanded his attention. How long this will last remains uncertain because there are other potential areas of conflict, ranging from Chinese investments in Brazilian ports and infrastructure to the 2026 Brazilian election. In that election, President Trump will likely seek to weigh in and influence the outcome through public statements or symbolic gestures. It may just be with tweets, or by receiving Flávio Bolsonaro at Mar-a-Lago or at the White House. This story is not over yet.

You have highlighted the role of backchannel actors in facilitating dialogue between Washington and Brasília. How important were these informal intermediaries compared to traditional diplomatic institutions, and what does this tell us about how US-Brazil relations are managed today?

BW: The world is changing, and diplomacy is changing with it. One of the clearest signals that the American stance on Brazil was shifting, in August and September of 2025, was Richard Grenell's trip to Brazil. Remarkably, this visit did not appear in the press at the time, even though he met with many people during a highly sensitive period. It was someone operating outside the traditional State Department structure who began assembling what later became the truce between the United States and Brazil.

Brazil is not the only case where this pattern has appeared. The current diplomatic operation in Washington is unusual. On one hand, Marco Rubio wields considerable power as Secretary of State and as head of the National Security Council. On the other hand, there are figures like Grenell and various regional envoys appointed to handle key issues. What unites these dynamics is a US government that is less institutional and more personal than ever before, a pattern that is not traditionally how American diplomacy has functioned, but is now less about which institution

someone leads and more about who can access the Oval Office and gain the President's ear.

[The current US government] is less institutional and more personal than ever before, a pattern that is not traditionally how American diplomacy has functioned, but is now less about which institution someone leads and more about who can access the Oval Office and gain the President's ear.

Formal titles matter less than the ability to speak directly with President Trump. The Brazilian case demonstrated this clearly, not only diplomatically but also economically. Another critical step in thawing relations between the two countries was a series of meetings between corporate and business leaders and President Trump and his emissaries. Some of these encounters became public, such as meetings between JBS executives and the President, which were reportedly important. Others were less visible, including meetings involving figures such as J.D. Vance and Marco Rubio.

This reflects the pattern of contemporary Washington. International issues are

no longer necessarily resolved through the State Department. Instead, they are often handled directly through the Oval Office or through lobbyists and intermediaries within President Trump's personal circle who can advocate for specific interests.

Even with reduced tensions, you suggest that economic and political pressure on Brazil is likely to continue. Looking ahead to 2026, which issues—such as trade, critical minerals, technology, or democracy—do you expect to become the main sources of friction between Lula and Trump, and what would a realistic strategy for managing these differences look like from Brazil's perspective?

BW: This question touches on a broader lesson from Brazil's recent experience. I am proud to be associated with Brazil, a country I have lived in and that has become an important part of my professional life. Over the past six months, many people have asked how Brazil managed to enter into a direct confrontation with Donald Trump and not only survive but also emerge relatively well-positioned. It is not clear that there was a definitive winner or loser, since this episode is likely to end with an agreement on critical minerals that benefits both Brazil and the United States.

However, one lesson is that Brazil had more power from the outset than many observers, myself included, believed it did. I had argued publicly that Brazil's economy was vulnerable and that, for the US economy, Brazil represented little more than a rounding error. That assessment was wrong. Brazil was able to find alternative markets for most of its exports, and Brazilian and American companies ensured from the beginning that the list of tariff exceptions was substantial.

At the same time, the United States proved more vulnerable than expected, particularly regarding coffee and meat supplies. From Brazil's perspective, the lesson is that its size and diversified international relationships provide a degree of resilience in confrontations of this kind. The downside is that this model is difficult for other countries to replicate. There is only one Brazil, and in Latin America, no other country comes close to this scale and level of importance. Mexico is the only country that comes close in size, but its vulnerability lies in the fact that more than 80% of its exports go to the United States.

It is an interesting case for Brazil, but less instructive for other countries around the world. One possible exception is Europe, where there is ongoing debate about whether to confront President Trump directly or pursue accommodation. The Brazilian experience suggests that Europe may have more leverage than it

The Brazilian experience suggests that Europe may have more leverage than it assumes and could be better positioned to defend its national interests than commonly believed.

assumes and could be better positioned to defend its national interests than commonly believed.

You argue that Trump's foreign policy toward Latin America has been relatively successful so far (as of February 2026), and that President Trump views the region primarily through two lenses: immigration and organized crime/drug trafficking. But Venezuela is not directly connected to these two issues, even though Trump framed the attack in those terms. Do you think the intervention in Venezuela can be explained solely by these two factors, or does strategic competition with China also play a significant role?

BW: Immigration and drug trafficking were indeed important factors in explaining the US operation in Venezuela and the subsequent accommodation reached with what remains of the Venezuelan government. While other parts of the Caribbean and

Latin America play a larger role in drug trafficking than Venezuela does, the presence of organized crime groups and cocaine trafficking there is undeniable.

In the context of migration, Venezuela experienced an extraordinary crisis, with roughly eight million people leaving over a decade, equivalent to a quarter of the population. Most migrated to other South American countries rather than to the United States, which helps explain why public opinion across much of South America supported President Trump's actions. People in countries such as Colombia, Peru, Chile, and Brazil directly witnessed the effects of Nicolás Maduro's policies and the strain that large migration waves placed on social services and public systems. Brazil is somewhat of an exception, but the broader regional impact was visible.

On the day of the military operation, January 3, President Trump focused heavily on oil in his press conference, mentioning it repeatedly and not referring to democracy at all. Oil was clearly a priority. China was also a factor, though not the top priority. Strategic competition with China matters to the United States in Latin America, but it currently ranks below migration, drugs, and access to natural resources such as oil and critical minerals. There is debate within the Trump administration about this hierarchy, and it may evolve over the remaining years of the administration.

China is undeniably expanding its presence in countries such as Brazil,

but Latin America is changing as well. The region is shifting to the right politically, as seen in Ecuador, Bolivia, Chile, and Costa Rica, with more elections on the horizon. There may soon be additional right-wing leaders

aligned with Trump in countries such as Colombia, Peru, and possibly Brazil. Latin America has rarely attracted as much attention as it does now, and this heightened focus is likely to continue through 2026. 

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